

eMARS 603

Personal Service Contracts



Customer Resource Center

eMARS Training

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eMARS Personal Services Contracts

1 – Orientation

This course is designed for eMARS users who will create Personal Service Contracts and Memorandum of Agreement and will cover the Commonwealth of Kentucky's Personal Service Contracts process in detail.

- Personal Service Contracts are reviewed by the Finance and Administration Cabinet to ensure that the using agency follows all policy, procedures and statutes that govern Personal Service Contracts:
 - PSC Office reviews PSC
 - Finance-Legal Review
 - Finance-Cabinet Secretary Approval
- 45A.705 All proposed Personal Service Contracts and Memoranda Of Agreement received by the Legislative Research Commission LRC shall be submitted to the Government Contract Review Committee to:
 - Examine the stated need for the service;
 - Examine whether the service could or should be performed by state personnel;
 - Examine the amount and duration of the contract or agreement; and
 - Examine the appropriateness of any exchange of resources or responsibilities.
- 45A.700 Certain Personal Service Contracts in aggregate amounts of \$10,000 or less exempt from routine review Personal Service Contracts in aggregate amounts of ten thousand dollars (\$10,000) or less during any one (1) fiscal year shall be exempt from routine review by the committee and shall be filed with the committee not more than thirty (30) days after their effective date for informational purposes only.

eMARS contains several features that provide additional support to users who create Personal Services Contracts and Memoranda of Agreement documents. The eMARS Procurement Workspace consolidates in one place the links to the documents and inquiries you will need to complete Procurement functions. eMARS also provides a **Procurement Type** field used to identify the Business Process being followed to procure goods or services for a given requirement. **Procurement Type** controls which documents may be processed, how Vendors will be evaluated in the Post Award State, and which Authorities may be cited on an Award Document.

Cited Authorities are only applicable to certain **Procurement Types**. When completing a document it is important to select the **Procurement Type** first as this action will filter the list of **Cited Authorities** to show only those that are relevant.

This Personal Services Contracts class is designed to provide you with a detailed understanding of the Commonwealth of Kentucky's Personal Service Contract processes and the eMARS procurement functionality as it relates to Personal Services Contracts.

Learning Objectives

At the conclusion of this session, you will be able to:

- Conduct a Competitive Sealed Bid using the Request for Proposal (**RFP**) document, Solicitation Response (**SR/SRW**) and Evaluation (**EV**) document.
- Award a Proof of Necessity Agreement (**PON2**).
- Process an Memorandum of Agreement (MOA) on a **PO2**
- Evaluate Vendor Performance (**PE**).
- Track documents and work in progress using the Lifecycle Inquiry (**LINQ**).

Document Codes & Listings

The following table displays the Procurement document codes, types, names, purposes and how to process payments against award documents.

| DOC CODE | DOC TYPE | DOC NAME | PURPOSE AND NOTES |
|----------|----------|------------------------|---|
| PE | ADM | Performance Evaluation | Record Vendor Performance - Evaluators must be set up on the PEEVALR table by the contract administrator. Based on the Document ID |
| RN | ADM | Renewal | Used to extend the Master Agreement effective dates by the next renewal period. The periods must be established on the MA document. Created by Copying Forward to a RN document. The RN when submitted creates a new modification of the MA which must be submitted through workflow. The Modification won't be generated until a batch cycle is run during the nightly cycle on the documents indicated effective date. |
| TM | ADM | Termination | Created by the contract administrator by copying forward from the award document. When submitted to final, a draft modification is created immediately for submitting to workflow. Reason for change is already populated with the reason for termination from the RN document. |
| CT | AWARD | Contract - 3 Way Match | Created only by Centralized Procurement agencies (OMPS, KYTC, DECA and AOC) to be referenced by other user departments. Used for one time purchases of goods. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires a Receiver (RC) document and an Invoice (IN) document to be processed. The PRM will be auto-generated when the 3 way match is detected. |
| CT2 | AWARD | Contract - 2 Way Match | Created only by Centralized Procurement agencies (OMPS, KYTC, DECA and AOC) to be referenced by other user departments. Used for one time purchases of services and for those agencies who have received an exemption from 3 way match requirements. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires an Invoice (IN) document to be processed. The PRM will be auto-generated when the 2 way match is detected. |
| CTT1 | AWARD | Contract - 3 Way Match | Created only by KYTC. Must be created with the end user Department's Document Code in the header so that the Department can create the payment document to be processed. The PRM will be auto-generated when the way match is detected. |

| DOC CODE | DOC TYPE | DOC NAME | PURPOSE AND NOTES |
|----------|----------|------------------------------|---|
| CTT2 | AWARD | Contract - 2 Way Match | Created only by KYTC. Used for one time purchases of services who have received an exemption from 3 way match requirements. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires an Invoice (IN) document to be processed. The PRM will be auto-generated when the 2 way match is detected. |
| DO | AWARD | Delivery Order - 3 Way Match | Created by the end user department from the URCATS search. URCATS only results in a DO award which requires 3 way matching. It references a Master Agreement or MA catalog lines. Payment is made by processing a Receiver (RC) and Invoice (IN) document. The PRM will auto generate when the 3 way match is detected. |
| DO2 | AWARD | Delivery Order - 2 Way Match | Created by the end user department from the URSRCHMA search. User must select DO2 as the target document. It references a Master Agreement or MA catalog lines. Payment is made by processing a Invoice document the PRM will be auto generated when the 2 way match is detected. |
| MA | AWARD | Master Agreement | Created only by Central Procurement Departments. For recurring or blanket procurement needs. Does not place an order for any goods or services, but establishes pricing and terms and conditions for future purchases for a given period. Can be renewed based on defined renewal periods. Can be individual lines or catalog. Referenced by users either by URCATS or URSRCHMA. Direct payment can be made referencing a MA line or catalog by generating a PRC on the Commodity Group component of the UR Document. |
| PO | AWARD | Purchase Order - 3 Way Match | Created only by Decentralized Procurement agencies. Used for one time purchases of goods. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires a Receiver (RC) document and an Invoice (IN) document to be processed. The PRM will be auto-generated when the 3 way match is detected. |
| PO2 | AWARD | Purchase Order - 2 Way Match | Created only by Decentralized Procurement agencies. Used for one time purchases of services. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires a Invoice (IN) document to be processed. The PRM will be auto-generated when the 2 way match is detected. |
| PON2 | AWARD | Purchase Order | Created by any Department for all Personal Service Contracts/Grants/MOA's which require review by the Government Contract Review Committee. Requires completion of the PON information. Otherwise is exactly the same as a PO document. NO MATCHING REQUIRED. Users make payment by copying forward from the award to a PRC. |
| EV | EV | Evaluation Document | Created by the buyer to consolidate all Solicitation Responses, enter scoring, award justification. The resultant award is generated from within the EV document. |
| EVT | EV | Evaluator | Used when using a team for evaluations. EVT documents are loaded into the EV document for use in evaluations. |
| IN | IN | Invoice | The electronic representation of the vendors invoice in the system. This is not a payment document. It is the vendors billing. User is to enter the invoice date, as shown on the paper invoice, and calculate the payment date, based on the vendor terms. |
| RIN | IN | Invoice | A Recurring invoice established to generate a matching PRM for recurring monthly payments such as leases, copiers, and other consistent bills. |
| RC | RC | Receiver | Documentation that the goods were received. Required of all 3-way match awards. |
| PRC | PRC | Payment Request | The PRC payment document may be created by the end user as a standalone document or reference awards or master agreements with |

| DOC CODE | DOC TYPE | DOC NAME | PURPOSE AND NOTES |
|----------|----------|------------------------------|---|
| | | | external vendors. |
| PRCI | PRCI | Internal Payment Request | The PRCI payment document is created by the end user and must reference an award or master agreement with an internal vendor. |
| PRM | PRM | Payment Request | The PRM payment document is system generated through the two-way or three-way matching process for payment to external vendors. |
| PRMI | PRMI | Internal Payment Request | The PRMI payment document is system generated through the two-way or three way matching process for payment to internal vendors. No check or EFT is created. Money is transferred between agencies. |
| RQS | RQ | Standard Requisition | Usually created from scratch to request goods or services. Used by all departments. |
| UR | RQ | Universal Requestor | Created from URCATS, and will result in a DO or RQS dependent on whether an item is available on contract or not. |
| BAFO | SO | Best and Final Offer | Used for a subsequent round of responses to an RFP, limited only to those finalists from preliminary round. |
| RFB | SO | Request for Bids | Can only be issued by OMPS, DECA, KYTC and AOC. |
| RFI | SO | Request for Information | Does not result in award, just seeking information on possible solutions, market conditions, etc. |
| RFP | SO | Request for Proposals | Used by any department for all Personal Service Contracts, or by Central Procurement agencies for complex procurements. |
| RFQ | SO | Request for Quotes | Issued by any department for solicitation of goods or services within the small purchase delegation for the department. |
| SR | SO | Solicitation Response | Used to record the vendor's response to a solicitation. |
| SRW | SO | Solicitation Response | Same as the SR, but generated through the Solicitation Response Wizard. |
| VCC | VC | Vendor/Customer Creation | Creates a Vendor record. Processed for approval by Statewide Accounting Services |
| VCM | VC | Vendor/Customer Modification | Modifies a Vendor record. Processed for approval by Statewide Accounting Services |
| RPO | | Recurring Payment Order | Establishes a schedule resulting in regularly produced orders for goods or services. Likely uses include regular stocking of items such as lab tests, which are required to always be fresh. |

2 – Commonwealth of Kentucky Procurement Process

Procurement Lifecycle

The Commonwealth's Procurement Lifecycle consists of the following six major phases:

- **Requisition** – a request for goods or services is created.
- **Solicitation** – requirements for goods or services are advertised and Vendors are requested to submit information, quotes, bids or proposals.
- **Solicitation Response** – Vendor responses to Solicitations are received and recorded.
- **Evaluation** – Vendor responses to a Solicitation are evaluated for award.
- **Award** – formal agreements are established with a Vendor to either purchase goods or services or set prices for future purchases.
- **Post Award** – the activities that take place during the remainder of a Vendor contract after award.

It is not required that every procurement go through all of the above procurement phases or to proceed through these phases in sequence. The only two required phases are Award and Post Award. For **PSCs** and **MOA**, as an example, the Requisition (**RQS**) phase is not required.

Agencies will generally follow the processes detailed below:

Requisition

In the Requisition phase, a user creates a request for the desired goods or services. For procurements that exceed an agency's Delegated Authority, a user must prepare a Requisition (**RQS**) document in eMARS to describe the requirement, receive departmental approval, and route to Office of Procurement Services (**OPS**) and Division of Engineering and Contract Administration (**DECA**) for subsequent processing.

NOTE: The Commonwealth will only use the Standard Requisition (**RQS**) document code. Depending on the **Procurement Type**, the **RQS** may be optional.

Solicitation

The eMARS Solicitation phase encompasses the documents and events used to advertise a requirement and request Vendors to submit information, quotes, bids, or proposals. The Solicitation phase has only one document type, Solicitation (**SO**). eMARS uses the following six distinct document codes:

- Request for Information (**RFI**)
- Request for Proposal (**RFP**)
- Request for Bid (**RFB**)
- Request for Quote (**RFQ**)
- Best and Final Offer (**BAFO**)
- Reverse Auction (**RA**)

The **RFP** document and its use in the Competitive Negotiation and Competitive Sealed Bidding processes are covered in detail in this course.

Depending on the **Procurement Type**, the Solicitation phase may be optional.

The Solicitation documents do not have any **Event Types** tied to them, as they do not perform any accounting updates upon submission.

Solicitation Response

Vendors respond to Solicitations issued by the Commonwealth and their responses are recorded. The Solicitation Response (**SR**) phase encompasses the documents and events used to record a Vendor's response to a Solicitation.

Solicitation Response (**SR**) is divided into two main areas:

- Vendor Functionality – operates as a separate application, Vendor Self Service (**VSS**) integrated with eMARS.
- Buyer Functionality – the Buyer performs the following function from eMARS:
 - Enter responses for vendors not registered in Vendor Self Service (**VSS**).

There is only one Solicitation Response document type Solicitation Response (**SR**), and two Solicitation Response document codes:

- Solicitation Response (**SR**)
- Solicitation Response Wizard (**SRW**)

Depending on the **Procurement Type**, the Solicitation Response phase may be optional.

Evaluation

The Evaluation phase encompasses the documents and events used to evaluate a Vendor's response to a Solicitation. Once all bids have been received and a solicitation closing date has passed, the procurement moves into the Evaluation phase where responses are inspected, analyzed, and ranked against all other responses by designated evaluators.

There is only one Evaluation document type, Evaluation (**EV**). The Evaluation document type has two distinct document codes:

- Evaluation (**EV**)
- Evaluator (**EVT**)

Award

Awards range from contracts for consulting services to master agreements for office supplies. The Award phase is the **ONLY** mandatory phase in the Procurement Process.

The Award phase encompasses the documents and events used to establish a formal agreement with a Vendor, either to purchase defined goods or services or to set prices for future purchases.

The following documents may be used in the Award phase:

- Purchase Order (**PO/PO2**)
- Contract (**CT/CT2/**) (**CTT1/CTT2 KYTC ONLY**)
- Master Agreement (**MA**)
- Delivery Order (**DO/DO2**)
- Proof of Necessity Agreement (**PON2**)

Post Award

The Post Award phase begins immediately after an Award has been made to a Vendor and encompasses the documents and events that take place during the remainder of the life of the contract.

Post Award encompasses three main areas:

- Matching (receipt of goods and payment)
- Vendor Performance (**PE**)
- Contract Administration

The following documents may be used in the Post Award State:

- Receiver (**RC**)
- Invoice (**IN**)
- Vendor Performance Evaluation (**PE**)
- Termination (**TM**)
- Renewal (**RN**)

The Post Award phase is also used as the central repository for all documentation associated with the Contract Management of a Procurement (e.g. Bid Deposits, Insurance Certificates, Warranties, Bonds, Retainage, Liquidated Damages, etc.).

Procurement Folder

The **Procurement Folder** is the central repository for documents and documentation related to a single procurement. eMARS compiles all activities, documents, and related correspondence for a procurement into a virtual **Procurement Folder** that ties multiple procurement documents and documentation items together. The **Procurement Folder** provides a single point for tracking, assigning, and reporting during the procurement life cycle. Each procurement document will belong to a specific **Procurement Folder**.

Each folder has a unique identification number generated by eMARS which allows users to identify the procurement documents and documentation items that apply to a particular purchase. Each folder also has a **Procurement Title** to easily identify the **Procurement Folder**. The **Procurement Title** is displayed on various procurement related pages to aid in identifying the proper folder for a specific procurement.

Procurement Types

Procurement Types are used to classify and group similar purchases. **Procurement Types** are used to identify the Business Process being followed to procure goods or services for a given requirement. **Procurement Types** control which documents may be processed, how Vendors will be evaluated in the Post Award State, and which Authorities may be cited on an Award Document.

For each **Procurement Type**, business rules for processing are assigned that include the following:

- Manager
- Required phases (e.g. Requisition, Award, etc.)
- Allowable Documents (e.g. **RQS**, **PO**, **RC**, **IN**, etc.)

A Performance Evaluation Template is assigned to each **Procurement Type**. This template determines the **Evaluation Criteria** to use when creating a **Performance Evaluation (PE)** document.

Certain **Cited Authorities** are only applicable to certain **Procurement Types**. When completing an Award Document it is important to select the **Procurement Type** first as this action will filter the list of **Cited Authorities** to show only those that are relevant.

Cited Authorities

In order for a purchase to be legally processed, the Commonwealth of Kentucky requires a Cited Authority to be associated with each award and each payment document. This Cited Authority contains statutory, regulatory or policy citations for a purchase. This information is required when creating award and payment documents.

Proper completion of the **Cited Authority** field is *required* for the Commonwealth of Kentucky to comply with an agency's pre-audit delegation agreement resulting from **FAP 120-13-00 (Decentralization of the Pre-Audit Function)**.

Cited Authority represents the statutory, regulatory or policy citation – for example, "**FAP 145-11-00**".

Cited Authority is required on Award Documents, Payment Request and ABS Documents where there is no reference or only a memo reference to an award. **Cited Authority** is not required on Requisition or Solicitation documents.

The validation of the Cited Authority's minimum and maximum amount will occur at the document header level – the document amount and NOT the line amounts.

NOTE: The combination of **Document Department**, **Document Code**, **Procurement Type** and **Dollar Value** determine if a **Cited Authority** is applicable to the award document you are attempting to process.

3 - eMARS Procurement Document Sections

eMARS Procurement documents have a **Header** section and up to eight Detail Sections. The following paragraphs provide an overview of what each section is used for and the types of information that will be entered.

Document Sections

Header- The **Header** section lists general information associated with the entire document.

Vendor - The **Vendor** section provides Vendor information pertaining to:

- Suggested Vendors for providing the goods/services (Requisition phase documents)
- Vendor associated with a Solicitation Response (Solicitation and Evaluation phase documents)
- Vendor awarded a contract (Awards phase)

Vendors are selected from a pick list that is populated by the Vendor/Customer (**VCUST**) table.

Sub-Vendors- The **Sub-Vendors** section lists **Sub-Vendors** or Sub-Contractors associated with the procurement. Note that Commodity lines are not linked to the **Sub-Vendors**.

Commodity- The **Commodity** section lists all Commodities (goods or services) associated with the document. The Commonwealth will use a 5 digit Commodity Code allowing the user to provide more descriptive Commodity information.

Accounting Distribution- The **Accounting Distribution** section lists the fund distribution across multiple line items. This information allows for the distribution of commodity costs across multiple Accounting lines based on percentages.

Terms and Conditions- The **Terms and Conditions** section lists the **Terms and Conditions** associated with the document. The **Terms and Conditions (TRMC)** table is used to establish "pre-established" **Terms and Conditions** for selection on this detail section. **Terms and Conditions** defined on the **TRMC** table can include attachments that will be included in this detail section of the document. Users will be able to attach MS-Word documents in **.XML** format to be the **Terms and Conditions**. Users must have **Word2003** in order to attach modified documents to the **Terms and Conditions** component of the document.

Accounting- The **Accounting** section lists the accounting funds for each Commodity line.

Posting- The **Posting** Section lists the posting information for each Accounting line.

NOTE: As a general rule, for most procurement documents the components that you will navigate to are:

Header

Vendor (This is optional on **RQ** and **SO** document types)

Commodity

Accounting Distribution – While not required, this is a shortcut to populating funding information when all commodity lines contain identical funding or mostly the same funding elements

Terms and Conditions – On Solicitation and Award Documents

Accounting



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4 - Solicitation Process

The Personal Services process begins with the Request for Proposal (**RFP**) document. The Solicitation document is used to define the requirements/specifications for the services being requested and the **Terms and Conditions** for doing business with the Commonwealth.

When the Solicitation is submitted to Final status, eMARS will build a Bid Package for Vendors, send an e-mail notification to Vendors who are registered for the listed Commodities and who are listed in the Free Form Vendor list, and transmit the bid package to the Vendor Self-Service (**VSS**) web-site from which it may be downloaded.

Solicitation Documents

There are several types of Solicitations documents that perform similar but slightly different business functions. Please use the following table as a guideline for when to use each:

| Solicitation Document Code | Business Use |
|--------------------------------------|---|
| RFB (Request for Bid) | Used for Procurements where the Commodities for goods/services are delineated (Central Use Only). |
| RFP (Request for Proposal) | Used to propagate procurements that may not have exact parameters. May or may not be commodity driven. |
| RFQ (Request for Quotations) | Used by departments for competitive bidding opportunities under a department's three quote limit for non-professional services. |
| RFI (Request for Information) | Used to gather information when a conceptual need has been identified, but the detailed requirements needed to achieve the goal need to be defined. |
| BAFO (Best and Final Offer) | Second round of RFP . Selected respondents are provided the opportunity to alter their original response to reflect their best and final offer for the Solicitation. |
| RA (Reverse Auction) | Solicitation used to generate a Reverse Auction. Vendors must be pre-registered to participate. All Vendors can see the lowest bid. |

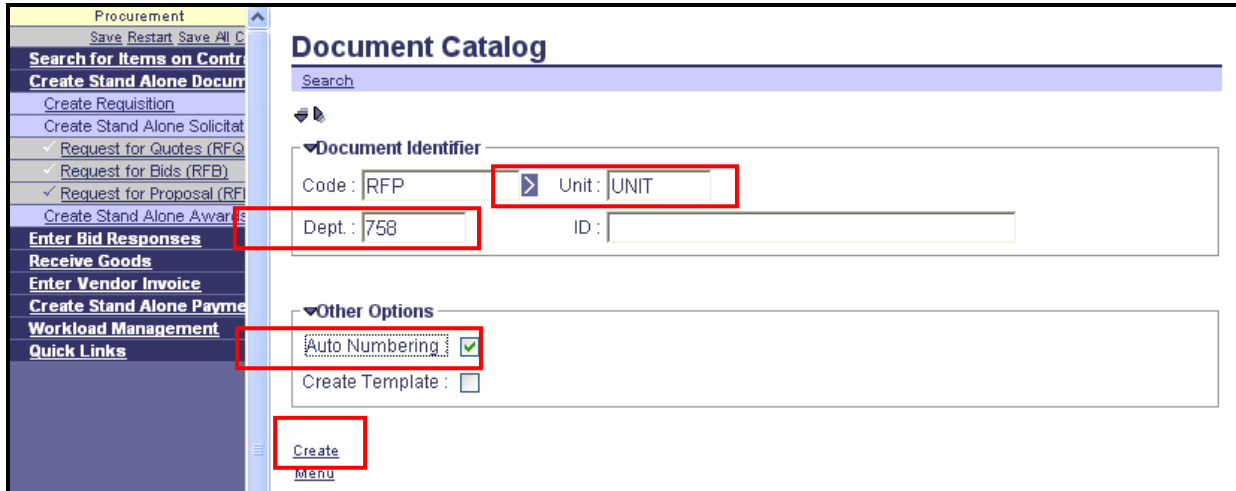
Solicitation documents may be created in one of three ways:

1. Directly from your **Procurement Workspace** not referencing any Requisition;
2. By **Copying Forward** from a Requisition (**RQS**) submitted by a department;
3. By **Copying Forward** from a Solicitation into a Best and Final Offer (**BAFO**) document.

Create a Solicitation

Access your **Procurement Workspace** and click the **Create Standalone Document** link in the Secondary Navigation Panel. Expand the **Create Standalone Solicitation** section. Click **Request For Proposal (RFP)**. The Document Catalog will open.

Click **Create** to switch into create mode.

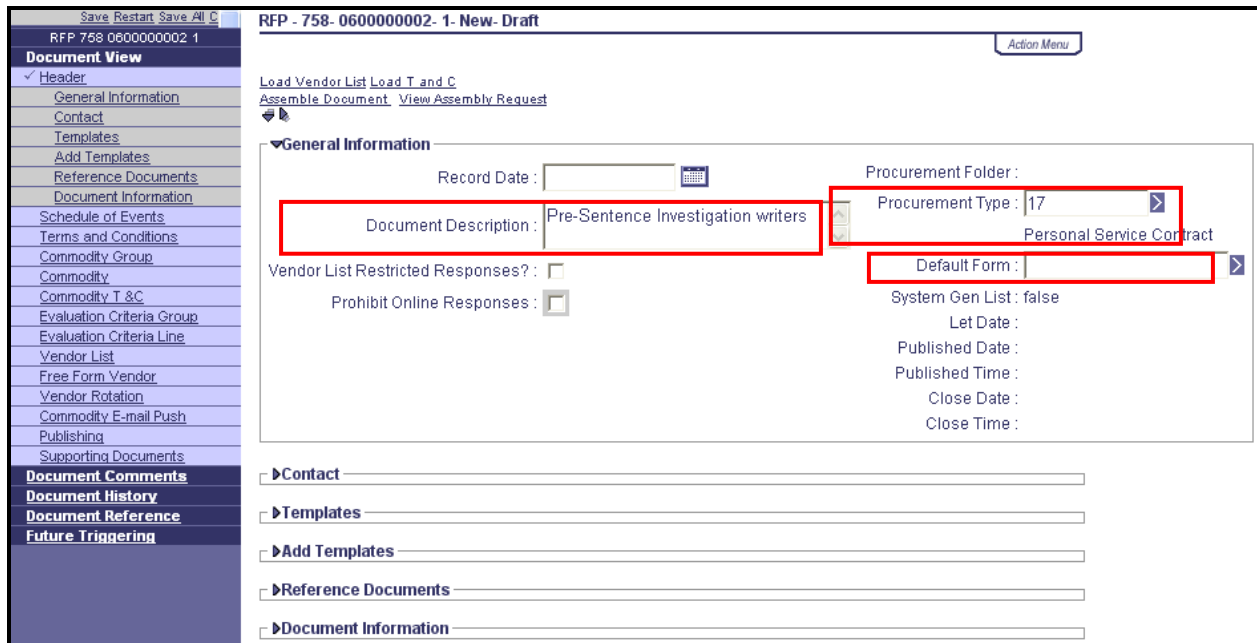


Enter your document **Department Code** and **Unit Code** into their respective fields.

Click **Auto Numbering**.

Click **Create** to create the **RFP** document. The document opens to the **Header** page.

Complete the required fields in the Solicitation document header.



- The **Document Description** is required and does print-out. The description is also searchable from various inquiries like the Procurement Document inquiry (**PRCUDOC**).
- Select a **Procurement Type ID** that corresponds to the business process being followed.
- eMARS uses the **Default Form** field during the assembly process to determine the lay-out of the assembled Solicitation. Kentucky will only be using one Form so leave this field blank and the correct Form will default when the document is submitted.

Complete the **Contact** section



- The **Issuer ID** field will default to your information. If you are completing the document on someone else's behalf then pick their record from the pick-list by clicking on the **arrow** next to the **Issuer ID** field.
- The **Requestor ID** field will be blank and needs to be completed. The **Requesting ID** field is used to identify for whom the goods or services are being requested, (e.g. who will actually be using the items or services detailed on the Solicitation). Pick their record from the Requestor pick-list by clicking on the **arrow** next to the **Requestor ID** field.

Complete the **Terms and Conditions** component. Terms and Conditions are created by attaching a Word Document, saved as **.XML** to the Terms and Conditions section of the Request for Proposal. The Office of Procurement Services (**OPS**) has developed a Terms and Conditions template for all Request for Proposal documents. A template exists for a Standard Professional Services RFP as well as a template designated for Legal Services. Both of these templates are located on the eMARS and the Office of Procurement Services websites. Each template contains the required information that must be incorporated in the Terms and Conditions sections and allows for users to make changes to areas of the template to be agency specific.

Users will need to download a copy of the desired RFP template from the website and modify **only** the highlighted portions of the template to make it specific to the agency. Once the changes have been made to the template the document will need to be saved as **.XML** and uploaded as a **Free Form Attachment** to the Terms and Conditions section of the document.

Please follow these steps to select a standard **Terms and Conditions** and modify

- Navigate to the Procurement Functional area of the eMARS website and Open a copy of the desired template that will need to be modified.

eMARS - enhanced Management Administrative Reporting System

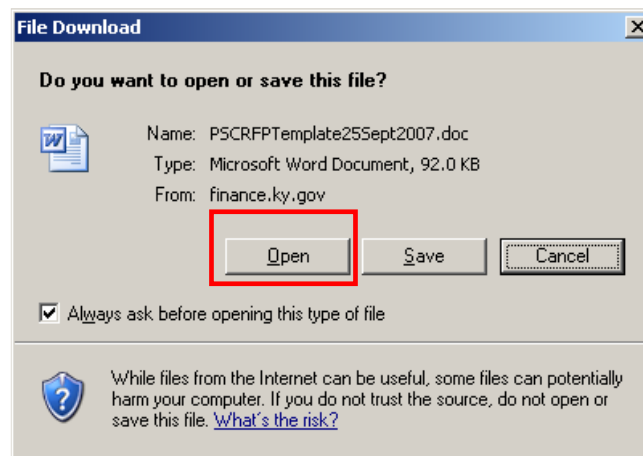
| eMARS Newsletter Issue 16 now available...Click here for more | | |
|---|---|--|
| Applications <ul style="list-style-type: none"> eMARS (Financial Production) FY 2007 Year-End <ul style="list-style-type: none"> Year-End Information (links related to year-end documentation such as allotment listings; pending transactions in eMARS; procedures, guidelines, communications, etc.) (07/18/07) Fiscal Year 2008 Monthly Closing Schedule (07/27/07) Communication | Training <ul style="list-style-type: none"> eMARS End-User Training (Training resources e.g. Catalog, ISGs, Materials, Manuals, Registration, Schedule) (10/04/07) update Support Orgs <ul style="list-style-type: none"> Controller's Office Commonwealth Office of Technology Customer Resource Center Office of Material and Procurement Services Statewide Accounting Services | Functional Areas <ul style="list-style-type: none"> Cost Accounting (08/23/06) Chart of Accounts (COA) Plan (08/08/06) Financial (08/03/06) Fixed Assets (10/02/07) update Interfaces (08/01/06) Procurement (i.e. Personal Service Templates) (10/05/07) update Reporting (08/15/07) Vendor Self Service (VSS) Security/Workflow Approvals (05/19/06) |

Procurement

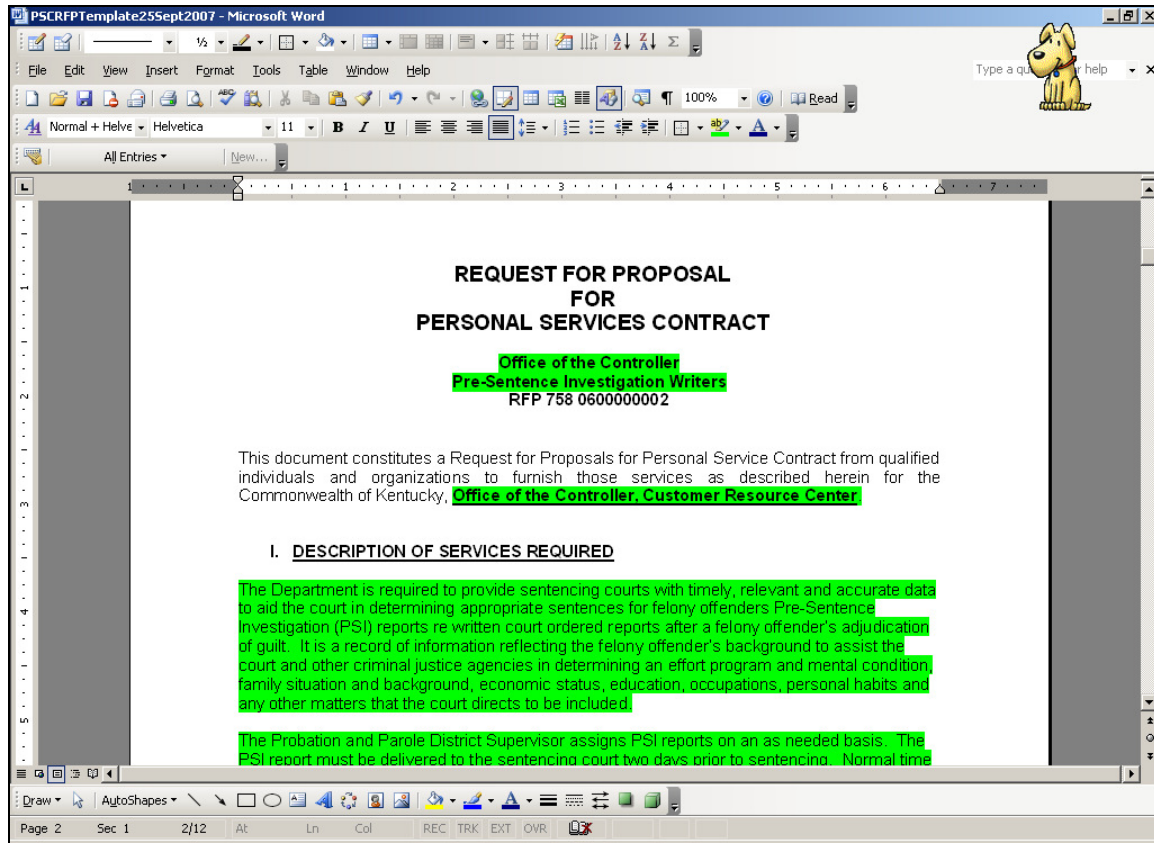
Terms and Conditions Templates

The following templates have been created by the Office of Procurement Services to replace the PSC1 Terms and Conditions.

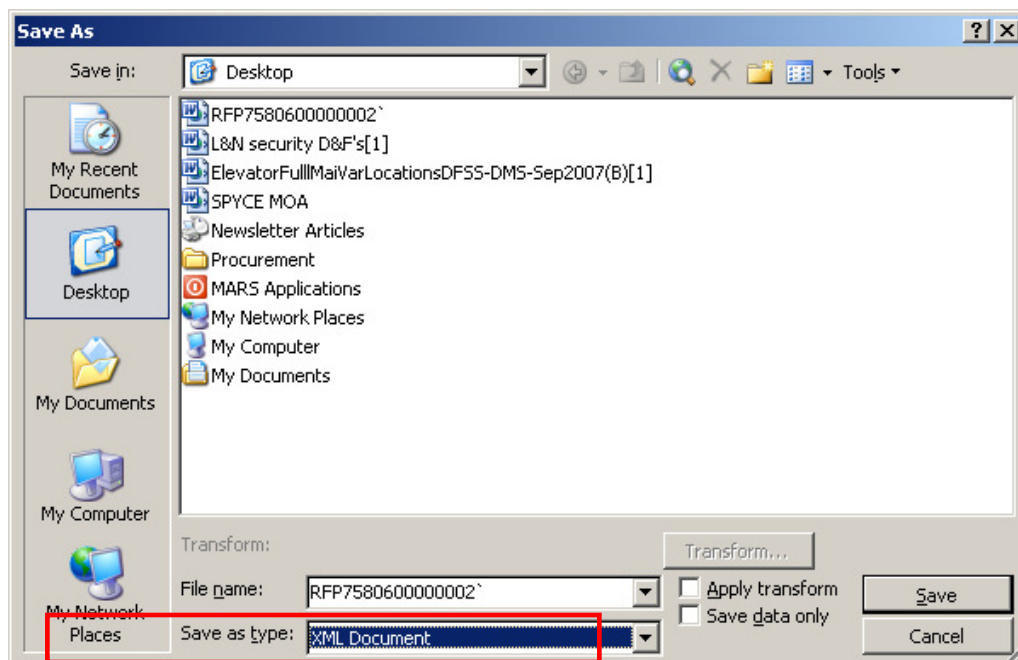
- Professional Services (RFP)** (10/06/08) **update**
- Personal Service Contracts (PSC)** (10/06/08) **update**



- Modify only the highlighted sections of the document to make it specific to the agency and the RFP. Make sure that you delete the instructions found on page one and remove all highlighting in the template before uploading into eMARS.



- c. Remove all highlighting from the document.
- d. Save the document to your local desktop as .XML



- e. Navigate to the **Terms and Conditions** section of the RFP and click Insert New Line. When the record has been added click on the **arrow** next to the T & C field and select the **Free Form** from the pick list.

NOTE: By selecting the Free Form Terms and Conditions the system allows you to attach your own **.XML** document to your **RFP** rather than a system standard. When the Free Form Template is used a blank document will be incorporated into the Attachments section of the RFP Terms and Conditions.

RFP 758 0700000002 1
Document View
Header
Schedule of Events
✓ Terms and Conditions
Commodity Group
Commodity
Commodity T & C
Evaluation Criteria Group
Evaluation Criteria Line
Vendor List
Free Form Vendor
Vendor Rotation
Commodity E-mail Push
Publishing
Supporting Documents
Document Comments
Document History
Document Reference
Future Triggering

RFP - 758- 0700000002- 1- New- Draft

Action Menu

| Section | T & C | Name | Inc By | Free Form Flag |
|---------|-------|------|-----------|----------------|
| ✂ | ✓ 1 | FREE | Free Form | by full text |

Insert New Line Insert Copied Line

First Prev Go To Next Last

T & C :

Name :

Section :

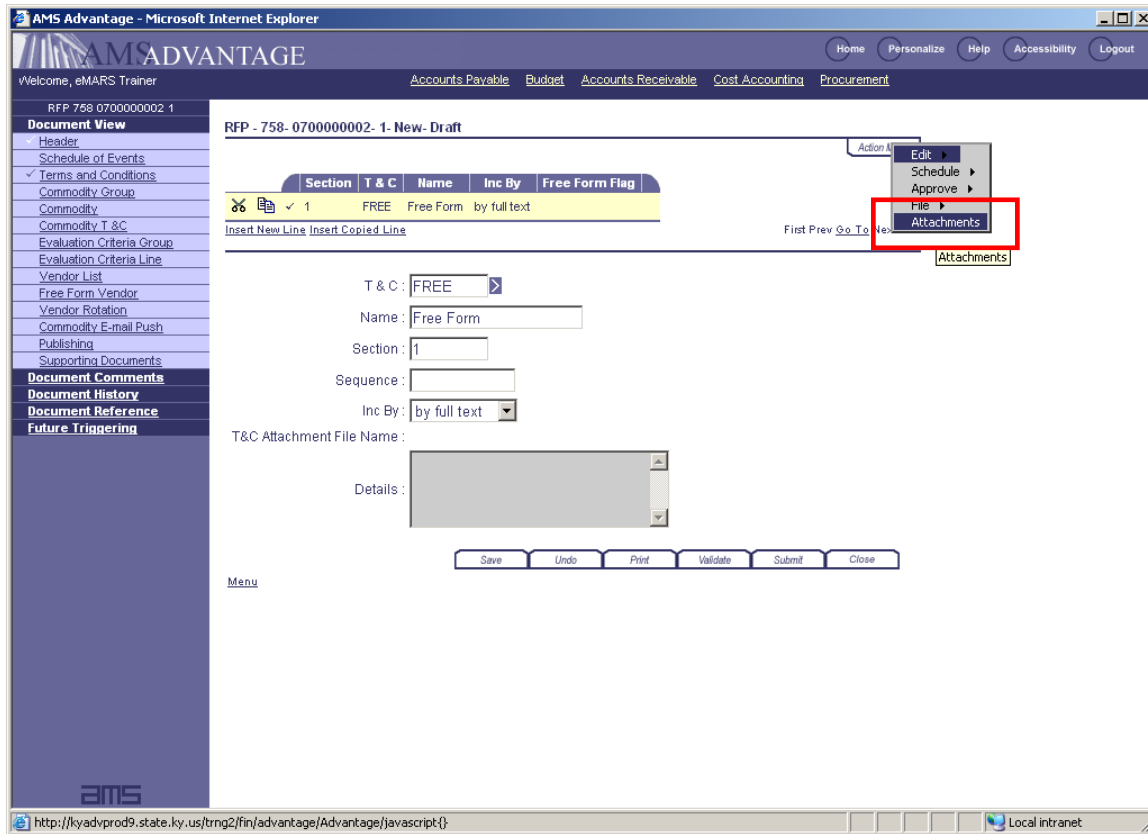
Sequence :

Inc By :

T&C Attachment File Name :

Details :

- f. Click the **Attachments** link from the **Action Menu**. This will allow you to attach your copy of the RFP template that you created in step B.



The screenshot shows the AMS Advantage web application interface. The top navigation bar includes links for Home, Personalize, Help, Accessibility, and Logout. The main content area displays the RFP - 758-0700000002-1- New- Draft form. The left sidebar contains a 'Document View' menu with options like Header, Schedule of Events, Terms and Conditions, and Attachments. The main form area includes a table with columns for Section, T & C, Name, Inc By, and Free Form Flag. The 'Attachments' link in the 'Action Menu' is highlighted with a red box.

| Section | T & C | Name | Inc By | Free Form Flag |
|---------|-------|-----------|--------------|----------------|
| ✓ 1 | FREE | Free Form | by full text | |

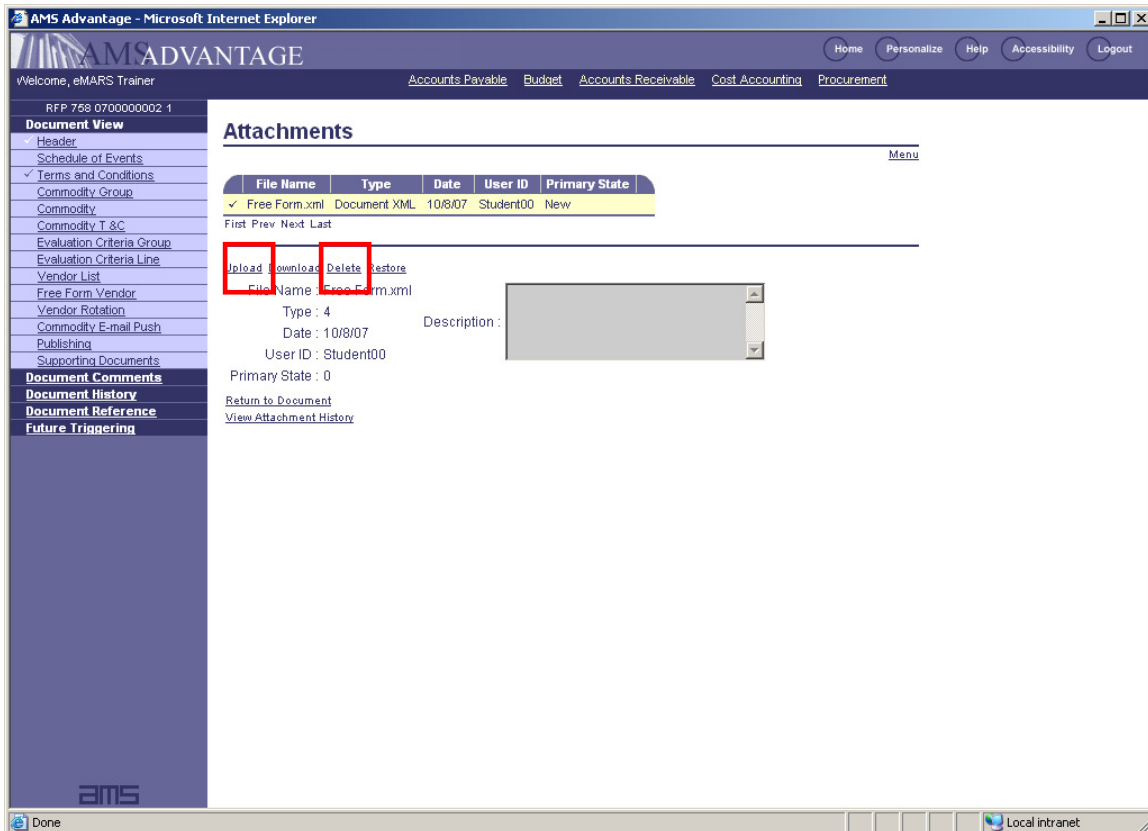
Form fields include:

- T & C:
- Name:
- Section:
- Sequence:
- Inc By:
- T&C Attachment File Name:
- Details:

Buttons at the bottom: Save, Undo, Print, Validate, Submit, Close.

- g. The **Attachment** page opens. Click **Delete** to discard the blank document brought in when Free Form was selected from the T & C picklist. Once the Free Form attachment has been deleted click **Upload** to attach your template.

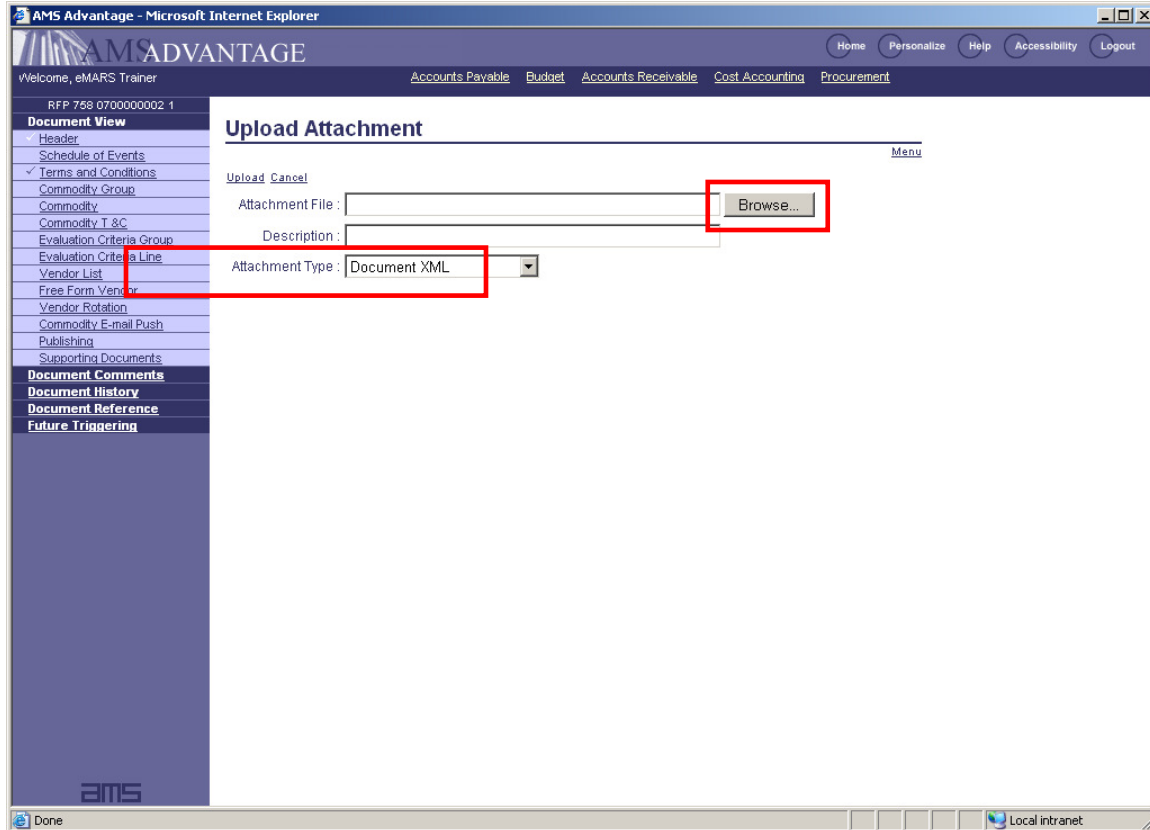
NOTE: It is important that you delete the default attachment that is automatically brought in when the Free Form T & C is selected. If the default is not deleted it may cause problems during the assembly process.



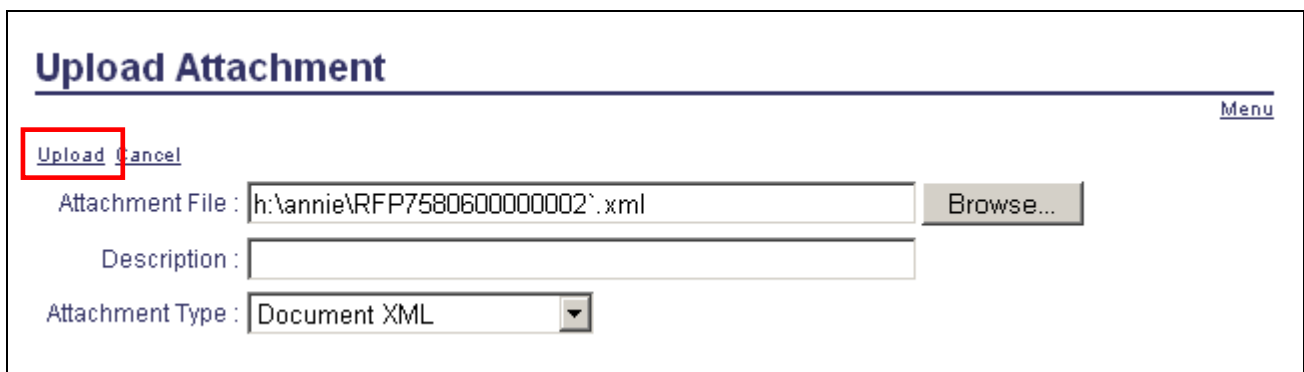
The screenshot shows the 'Attachments' page in the AMS Advantage application. The page has a sidebar on the left with various navigation links, including 'Document View', 'Document Comments', 'Document History', 'Document Reference', and 'Future Triggering'. The main content area displays a table of attachments. The table has columns for 'File Name', 'Type', 'Date', 'User ID', and 'Primary State'. There is one attachment listed: 'Free Form.xml', which is a 'Document XML' file, dated '10/8/07', created by 'Student00', and in a 'New' state. Below the table, there are buttons for 'Upload', 'Download', 'Delete', and 'Restore'. The 'Delete' button is highlighted with a red box. Below the buttons, there is a form for the selected attachment, showing details like 'File Name: Free Form.xml', 'Type: 4', 'Date: 10/8/07', 'User ID: Student00', and 'Primary State: 0'. There are also links for 'Return to Document' and 'View Attachment History'.

- h. Browse your local hard drive for the **RFP** Template that has been saved as an **XML** document.

NOTE: Make sure that the Attachment Type of Document **XML** is selected.



- i. Once you have located and selected the file, click **Upload**.



- j. Once the upload has completed successfully, click **Return to Document** to be transitioned back to the Terms and Conditions section of the RFP. Once there you will notice that the **T & C Attachment File** name has changed to your new file. eMARS will use this new file in the bid package/print out.

RFB - 758- 0700000002- 1- New- Draft

Action Menu

| Section | T & C | Name | Inc By | Free Form Flag | |
|---------|-------|------|-----------|----------------|-------|
| ✂ | ✓ 1 | FREE | Free Form | by full text | false |

Insert New Line
Insert Copied Line

First Prev Go To Next Last

T & C :
Name :
Section :
Sequence :
Inc By :

T&C Attachment File Name : RFP7580600000002.XML

Details :

Save
Undo
Print
Validate
Submit
Close

Menu

Create **Commodity Groups**. Commodity Groups are used to group Commodity lines together for organizational and evaluation purposes. The Evaluation Document (**EV**) allows you to award at the Commodity Group level. The Evaluation Spread-sheet will show the lowest bidder by Commodity Group. You must click **Insert New Line** to add a new group.

NOTE: A default group will always be created.

Save
Restart
Save All
C

RFP 758 0600000002 1

Document View

- ✓ Header
- Schedule of Events
- ✓ Terms and Conditions
- ✓ Commodity Group
- Commodity
- Commodity T & C
- Evaluation Criteria Group
- Evaluation Criteria Line
- Vendor List
- Free Form Vendor
- Vendor Rotation
- Commodity E-mail Push
- Publishing
- Supporting Documents
- Document Comments
- Document History
- Document Reference
- Future Triggering

RFP - 758- 0600000002- 1- New- Draft

Action Menu

| Line | Commodity Group Description | Group Total |
|------|-----------------------------|-------------|
| ✂ | 1 Services | \$0.00 |
| ✂ | ✓ 0 Travel | |

Insert New Line
Insert Copied Line

First Prev Go To Next Last

Save
Undo
Print
Validate
Submit
Close

Menu

The **Commodity Group Description** field is used to record the name of the Group. This field can be modified to rename the Group.

NOTE: To view the Commodity lines associated with a given **Commodity Group** you must select the Group in the **Commodity Group** grid section and then transition to the Commodity panel by clicking on the **Commodity** link in the Secondary Navigation Panel

Click on **Commodity** from the Secondary Navigation Panel. The **Commodity** section of the Solicitation is used to list all distinct goods or services being requested. Complete the required fields for the **General Information** section.

RFP - 758- 0600000002- 1- New- Draft

Action Menu

Load T & C Commodity

| Line | CL Description | Line Amount | Marked Delete? |
|------|------------------------|-------------|----------------|
| 1 | PSI Writer District 10 | \$525.00 | false |

Insert New Line Insert Copied Line

First Prev Go To Next Last

Commodity Line Group : 1 >

General Information

CL Description : PSI Writer District 10

Commodity : 99052
Investigative Services

Line Type : Service

Quantity :

Unit :

Unit Price :

Contract Amount : \$525.00

Service From : 04/19/2006

Service To : 04/30/2007

Catalog :

Effective From :

Effective To :

Marked Delete? : ☐

Commodity Specs :

Extended Description : The Department of Corrections, Division of Probation and Parole, is required to provide sentencing courts with timely, relevant and

Line Amount : \$525.00

Reference

Shipping/Billing

Specifications

- The **CL Description** field should be used to record a brief description of the good or service being requested. This field does print-out on all documents and is used on subsequent Procurement Documents. This field is displayed in the grid area of the **Commodity** section in order to help you identify which line you would like to inspect or modify.
- The **Commodity** field is used to store the five digit NIGP **Commodity Code** that most closely matches the item or service being purchased. This field is used primarily for classification purposes. When creating a Solicitation it is important to make the first Commodity line the one that is most relevant to the Solicitation as a whole. The first Commodity Code is used to determine which office will receive the Solicitation for processing.

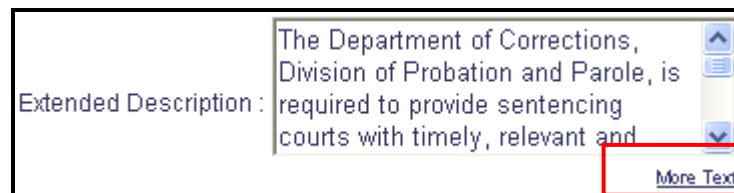
- The **Line Type** field is used to select how the cost of the line item will be established. Generally speaking, goods should be recorded with a **Quantity**, **Unit of Measure** and **Unit Price**. Services should be entered as **Contract Amount** with **Service From** and **Service To** dates. For **RFPs** that will result in a **PSC/MOA** please only select a line type of **Service**.
 - When you know the **Unit Price** a Line Type of “**ITEM**” should be selected. The **Unit of Measure**, **Unit Price**, and **Quantity** are required.
 - If the unit cost is unknown or not applicable the lump sum cost of the line should be recorded in the **Contract Amount** field. In this case a **Line Type** of “**Service**” should be selected. When the **Line Type** is Service then the **Service From** and **Service To** dates are required. These dates are the effective dates for resultant award document.

NOTE: If the resultant award will be paid from the **UPPS** payroll system- you must select a **Line Type** of service and provide a **Contract Amount**.

- The **Extended Description** field should be used to provide a detailed description of the desired item. Up to 4000 characters of information can be stored in this field. To access a larger field in which to type the **Extended Description** click on the **More Text** link.

NOTE: To insert a TAB into the **Extended Description** field the user must type [Ctrl] + [Tab].

NOTE: The user may copy a description from MS-Word or another word processing format and paste into this field using [Ctrl] + [C]/[Ctrl] + [V]

A screenshot of a web application interface showing the 'Extended Description' field. The field contains the text: 'The Department of Corrections, Division of Probation and Parole, is required to provide sentencing courts with timely, relevant and'. To the right of the text is a vertical scroll bar. Below the scroll bar is a button labeled 'More Text' which is highlighted with a red rectangular box.

Commodity Extended Description

[Menu](#)
[Save](#) [Cancel](#) [Return to Line Item](#)

Commodity Group : 1 Comodity Line Item : 1

The Department of Corrections, Division of Probation and Parole, is required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders. Pre sentence investigation (PSI) reports are written court ordered reports after a felony offender's adjudication of guilt. It is a record of information reflecting the felony offender's background to assist the court and other criminal justice agencies in determining an effort program for the offender including an analysis of the history of delinquency or criminality, physical and mental condition, family situation and background, economic status, education, occupation, personal habits and any other matters that the court directs to be included.

The Probation and Parole District Supervisor assigns PSI reports on an as needed basis. The PSI report must be delivered to the sentencing court two days prior to sentencing. Normal time allotted for the completion of a PSI report three weeks. The PSI writer may be called upon to attend court proceeding if ordered by the judge.

Complete the **Shipping/Billing** Information section.

| Shipping/Billing | |
|---|---|
| Shipping Location : 115146 | Billing Location : 115145 |
| Attention : 219666 | Attention : 219666 |
| KRC-HOPKINSVILLE-ROGER BROWN 4011 FORT CAMPBELL BLVD 105 HAMMOND PLAZA HOPKINSVILLE KY 42241 US | KRC-HOPKINSVILLE-ROGER BROWN 4011 FORT CAMPBELL BLVD 105 HAMMOND PLAZA HOPKINSVILLE KY 42241 US |
| Additional Info : <input type="text"/> | Additional Info : <input type="text"/> |
| Shipping Method : <input type="text"/> | |
| Free On Board : <input type="text"/> | |
| Delivery Date : <input type="text"/> | |
| Delivery Type : <input type="text"/> | |

- The **Shipping Location** field is used to identify where the goods should be delivered. To select a **Shipping Location** click on the **arrow** next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location (PLOC)** reference table. For **RFPs** the **Shipping Location** field is not required.
- The **Billing Location** field is used to identify to where the Vendor's Invoice should be mailed. To select a **Billing Location** click on the **arrow** next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you

may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location (PLOC)** reference table.

- The **Delivery Date** field is used to enter the date by which you will need the goods being requested to be delivered.

NOTE: Do not complete the **Shipping Method, Free on Board, Shipping Additional Info, Billing Additional Info** and **Delivery Type** fields. These fields are not required. These fields do not print-out.

Click **Evaluation Criteria Line** from the Secondary Navigation Panel to create the **Evaluation Criteria** for this Solicitation. This section allows you to define specific considerations for evaluating responses, and apply a point value for each.

RFP - 758- 0600000002- 1- New- Draft

Action Menu

| Line | Criteria | Short Description | Points | Free Form Flag | Marked Delete? |
|------|----------|-------------------|--------|----------------|----------------|
| 1 | PRICE | Lowest Price | 20 | false | false |
| 2 | QUAL | | 40 | true | false |
| 3 | EXP | | 40 | true | false |

Insert New Line Insert Copied Line

First Prev Go To Next Last

Evaluation Criteria Group : 1 >

Criteria : >

Short Description : EXP

Description : Experience writing pre-sentencing reports

Response Type : Text

Points : 40

Marked Delete? : ☐

Mandatory YES Answer : ☐

- The **Criteria** pick list allows you to select a pre-defined **Evaluation Criteria** from the eMARS database. If you would like to create your **Evaluation Criteria** this field may be left blank.
- Use the **Short Description / Description** field to describe the **Evaluation Criteria**. These fields will be populated if a pre-defined **Evaluation Criteria** has been used. Can also be used to create new Elavuation Criteria that is not part of the Criteria Pick List above.
- The **Response Type** field is used to determine the format of the response required from Vendors. Possible choices are: Text, Number, Yes/No, Date, and None.

- The **Points** field is used to determine how many points may be awarded to a Vendor for the Response they've provided. It is used as part of the Evaluation process to determine which vendor will receive the award.
- The **Marked Delete?** Check-box is used on Solicitation modifications to signify that the **Evaluation Criteria** is no longer part of the Solicitation.
- The **Mandatory YES Answer** check-box is used to require the Vendor to answer "Yes" to **Evaluation Criteria** that have been set-up with a **Response Type** of Yes/No. Solicitation Response documents with a "No" answer to a Mandatory **Evaluation Criteria** may not be submitted.

Click **Free Form Vendor** from the Secondary Navigation Panel to create the **Free-Form Vendor** list. The **Free-Form** Vendor list is used to ensure that Vendors identified here will receive email notification of the solicitation once it has been posted to the Vendor Self Service website.

RFP - 758-0600000002- 1- New- Draft Action Menu

| Line | Vendor Name | Alias/DBA | Principal Contact | Business Type | Default Correspondence |
|------|-----------------------------|-----------|-------------------|---------------|------------------------|
| 1 | Robby Burris Investigations | | Robby Burris | | Email |

[Insert New Line](#) [Insert Copied Line](#) First Prev Go To Next Last

Vendor Name: Principal Contact:

Alias/DBA: Phone:

Business Type: Fax:

Address 1: Email:

Address 2: Default Correspondence:

City: Comments:

County Code: County:

State/Province: Zip:

Country: US

[Top](#)

Click **Commodity E-mail Push** link in the Secondary Navigation Panel. Vendors will receive automatic notification if they have registered for the Commodities listed on this component. This section is automatically populated when the document is populated based on the Commodity codes identified in the **Commodity** section. You may also add and delete Commodity codes if necessary.

RFP - 758- 0600000002- 1- New- Draft Action Menu

| Line | Commodity Class | Description |
|------|-----------------|--|
| 1 | 99052 | Investigative Services |
| 2 | 99000 | SECURITY, FIRE, SAFETY, AND EMERGENCY SERVICES |

Insert New Line Insert Copied Line First Prev Go To Next Last

Save Undo Print Validate Submit Close

Menu

Complete the **Supporting Document** section. This section allows you to view and attach files relevant to the entire document, for example, a Statement of Work or other Supporting Documents. Documents in the **Supporting Document** section will be included in the Assembled Solicitation document. Documents in this section *must* be in MS-Word **XML** format. **Supporting Documents** will be placed in the Bid Package after all **Terms and Conditions**. **Supporting Documents** will be ordered within the package by the **Publishing Sequence** field.

RFP - 758- 0600000002- 1- New- Draft Action Menu

| File Name | Description | Publishing Sequence | Date |
|----------------------|-------------|---------------------|--------|
| Campaign_Finance.xml | | 1 | 4/5/06 |

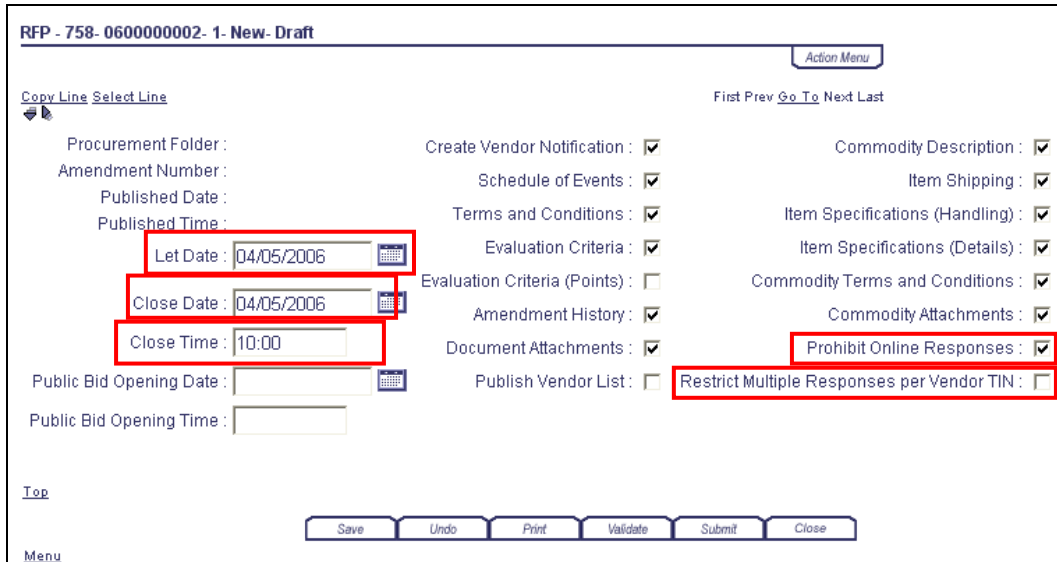
Insert New Line Insert Copied Line First Prev Go To Next Last

File Name : Campaign_Finance.xml
Description :
Publishing Sequence : 1
Date : 4/5/06
User ID : MSHAW

Supporting Document Description : CAMPAIGN FINANCE FORM

- The **Publishing Sequence** field is a numeric value which allows you to establish the display order for the attachments on the assembled Adobe Acrobat **.PDF** file. This field is required. When the document is validated, the system performs data validation to ensure that the sequence value is sequential and that it has not been duplicated on other records.
- The **Supporting Document Description** field is used to describe the nature of the attached document. This value does not print and is for reference only.

Complete the **Publishing** Section. The **Publishing** Section is where you establish the **Close Date** and **Close Time**; whether or not to allow on-line bidding; and what elements will appear in the Vendor Self Service (**VSS**) rendering of the Solicitation.



- The **Let Date** is the day the Solicitation is to be published. (Required)
- The **Close Date** is the date after which Bids/Responses will no longer be accepted from Vendors (Required).
- The **Close Time** is the Time on the **Close Date** after which Bids/Quotes/Responses will no longer be accepted from Vendors (Required).

NOTE: The Closing Time must be supplied in 24hr military time (e.g. 9:30am=09:30, 2:00pm=14:00).

- **Public Bid Opening Date/Time:** These fields may be used to specify the time at which bids will be read to the general public. The time must be supplied in 24hr military time. (Optional)
- If the **Prohibit Online Responses** flag is not selected, then online responses via **VSS** are allowed. All Solicitations, regardless of the **Prohibit Online Responses** field setting, will be posted to **VSS** when the AMS eMARS Financial/VSS Synchronization process is run.

NOTE: Solicitation Modifications: Once a Solicitation has been finalized, the Buyer can allow online responses to that Solicitation if they were originally prohibited but the Buyer cannot prohibit online responses to that Solicitation if they were originally allowed.

- If **Restrict Multiple Responses per Vendor TIN** flag is selected, then only one response per Vendor **TIN** is allowed. If this flag is not selected, then more than one response per Vendor Taxpayer Identification Number (**TIN**) is allowed. This flag applies to responses entered through Vendor Self Service (**VSS**) and the Solicitation Response (**SR**) document.

NOTE: This flag **cannot** be changed during a modification of a submitted Solicitation document.

Click **Validate** to check for errors.

To Assemble:

1. From the **Header** Section click on **Assemble Document**
2. Click **Submit Assemble Request**
3. Click on **Refresh**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
4. Click **Back** to return to the document

To Print the Assembled Form:

1. Return to **Header**
2. From the **Action Menu**, select **Attachments**.
3. Click **Download**.
4. While the **PDF** document is open use the **File Menu** Options to either print or email the document.

Submit the document to initiate workflow for approval.

There are additional steps during the Solicitation Response phase:

Post/Monitor Questions that are submitted through Kentucky Vendor Self Service (**VSS**). When the Solicitation is posted to **VSS**, Vendors have the ability to ask questions about the Solicitation that will be automatically routed to you via e-mail.

Subject: ADVMAIL: V55Mail : New Question posted for Solicitation: RFB - 758- 06000000193

Dear Matthew Shaw,

This is to notify you that a vendor has posted a question for
Solicitation: RFB - 758- 06000000193 Amendment #0

Question : Will alternate buttons be accepted?
Question Date: 2006-03-28

Please logon to ADVANTAGE and go to the Solicitation Question & Answer (SOQA) page to
answer the question.

This notification is sent for you information because you are the buyer listed on the
above Solicitation.

Please do not reply to this e-mail as it is automatically generated. If you have questions, please
contact Customer Support.

When you receive the e-mail you must access the **Solicitation Question and Answers (SOQA)** table from **Page Search**. Search for the Solicitation by entering the **Doc Code**, **Solicitation Department** and **Solicitation ID** and clicking the **Browse** link. Select the row from the grid section that corresponds to your Solicitation and click the **Answer** link to respond to a vendor's question. To post a Question and Answer received Off-line (FAX, phone) select the row in the grid and click the **Ask Answer /Question** link.

Question & Answer Detail

[Menu](#) [Quick Search](#)

[Browse](#) [Clear](#)

Doc Code :

Solicitation Department :

Solicitation ID :

Procurement Folder :

| | Procurement Folder | Doc Code | Solicitation Department | Solicitation ID | Amendment Number | Let Date | Published Date | Close Date |
|---|--------------------|----------|-------------------------|-----------------|------------------|------------|----------------|------------|
| ✓ | 38004 | RFP | 721 | 0600000019 | 1 | 03/29/2006 | | 03/30/2006 |
| | 37604 | RFB | 758 | 0600000019 | 0 | 03/23/2006 | | 03/23/2006 |

First Prev Next Last

[Answer](#) [Ask Answer/Question](#)

Click the **Answer** link to transition to the **Answer** page where you may respond to Questions submitted through **VSS**.

Answer Question

[Menu](#)
[Quick Search](#)

| Doc Code | Doc Dept | Solicitation | Amendment Number | Question Date | Question | Answer Date | Answer |
|----------|----------|--------------|------------------|---------------|------------------------------------|-------------|-----------------------------|
| ✓ RFB | 758 | 0600000019 | 0 | 03/25/2006 | Will alternate buttons be accepted | 03/29/2006 | No-only exact specification |

[First](#)
[Prev](#)
[Next](#)
[Last](#)

Save

Undo

Doc Code : RFB

Doc Dept : 758

Solicitation : 0600000019

Amendment Number : 0

Question : Will alternate buttons be accepted

Answer :

No-only exact specification

[Question & Answer Detail](#)

- Enter your answer to the Vendor's question in the **Answer** field. You may enter up-to 250 characters of text.

NOTE: Your answer will become part of the public record and will be posted to the internet! Please consider typing your answer into MS-Word for spell check and then copying the text into the **Answer** field.

- Clicking the **Question & Answer Detail** link will transition you back to the first page where you selected the Solicitation.

Post a Question and Answer received through other means: e-mail, phone, FAX etc. From the **Question and Answer Detail** page search for and Select the Solicitation for which you wish to post a Question and Answer and click the **Ask/Answer Question** link.

Ask Question/Answer

[Menu](#)
[Quick Search](#)

[Save](#)
[Undo](#)
[Insert](#)
[Copy](#)
[Paste](#)
[First](#)
[Prev](#)
[Next](#)
[Last](#)

Doc Code : RFP
Doc Dept : 670
Solicitation : 0600000007
Amendment Number :

Question :

Does the job pay hourly or salary?

Answer :

Payment is not based on time spent per report. Payment is made in lump sum at the end of service.

[Answer ?](#)
[Question & Answer Detail](#)

- The **Question** field allows you to enter the question received from the Vendor. Please enter the Question exactly as received from the Vendor.
- Enter your answer to the Vendor's question in the **Answer** field. You may enter up-to 250 characters of text.

NOTE: Your answer will become part of the Public Record and will be posted to the internet! Please consider typing your answer into MS-Word for spell check and then copying the text into the **Answer** field.

- Click the **Save** link to post your response to **VSS**. It will be available for the public viewing after the next **VSS** synchronization.

It is also encouraged that you include any Questions and Answers in the Terms and Conditions of the Solicitation as well. This will allow all questions/answers that are posed to the buyer to post to the Vendor Self Service for all Vendors to see. To include the Questions and Answers in the Solicitation, the buyer will need to create a modification to the solicitation and modify the Terms and Conditions Template that has been attached to the Terms and Conditions section of the Solicitation. The Questions and Answers should be added to the beginning of the Terms and Conditions Template and should identify the Date, Modification Number, the Reason of the Modifications and all Questions and Answers. Once these changes have been added to the XML document it will need to be saved to your desktop and Uploaded in the Terms and Conditions section through the Action Menu. The previous attachment will need to be deleted and the new attachment with the Questions and Answers will need to be added in its place.

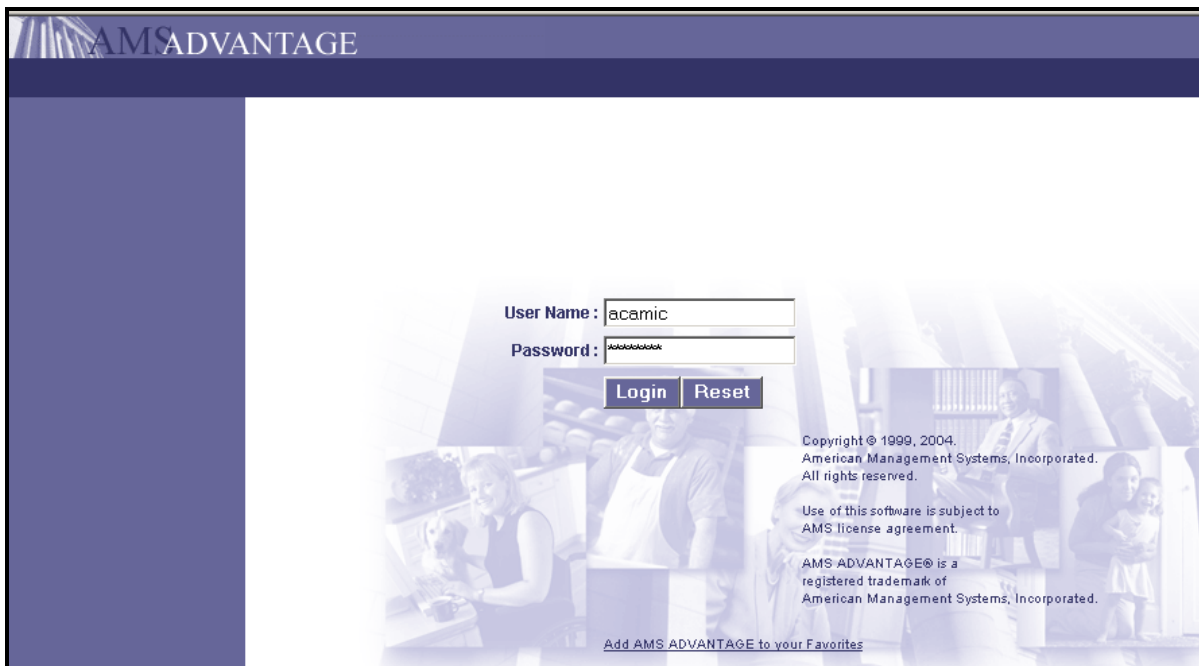


Exercises – Logging In to eMARS

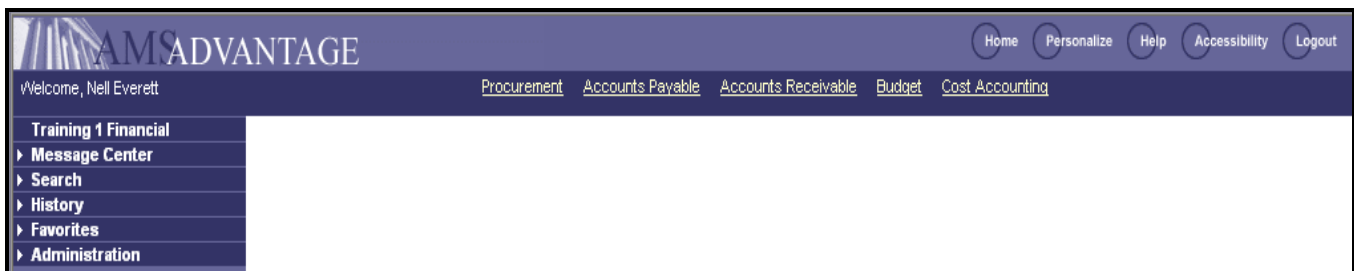
You will use a Student ID to access the training database during class. These IDs are only set up for the training environment. Your User ID for the production environment will be assigned along with a new password when eMARS is implemented.

From the Login page, enter the following information:

| Required Fields | Values |
|-----------------|--|
| User Name | Enter your Student ID from your student card. NOTE: User Names are case sensitive. |
| Password | Enter your Password from the student card and click Login . NOTE: Passwords are case sensitive. |



The Home Page appears.



Exercise 1 – Create a Solicitation (RFP) document from your Procurement Workspace

Scenario

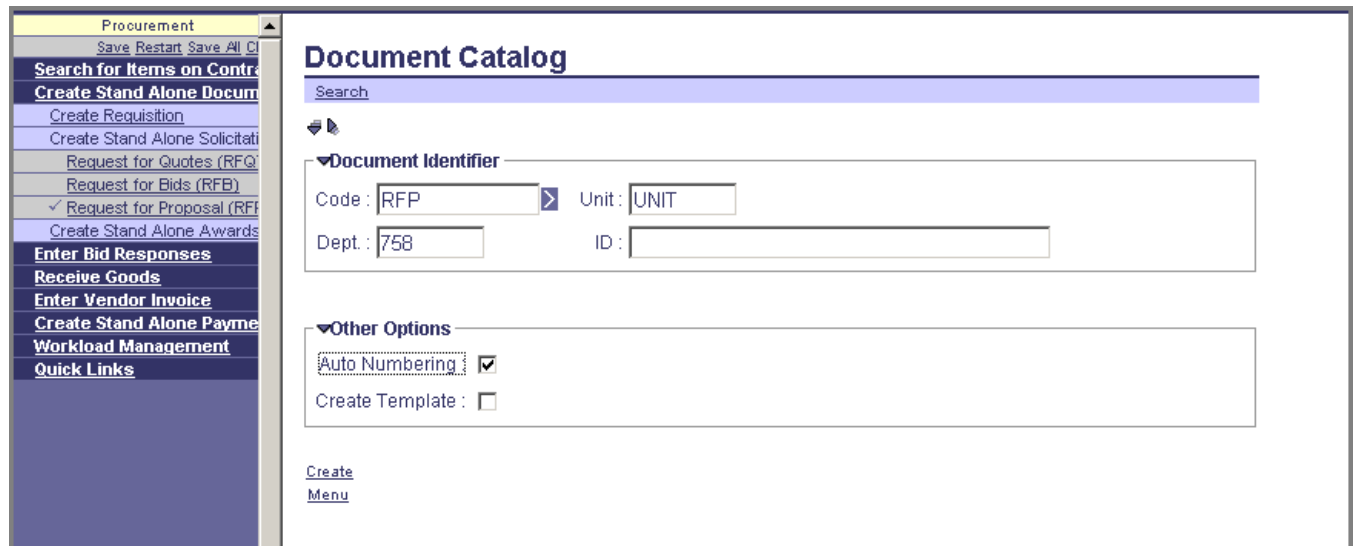
You need to initiate a Request for Proposal (**RFP**) Process for Pre-Sentencing Investigation Services for the Department of Corrections.

Task Overview

You will create an **RFP** from your **Procurement Workspace**. On the **RFP** you will add custom **Terms and Conditions**, build a **Free Form Vendor List**, build a list of the **Commodities** being solicited and set the **Publishing Dates**.

Procedures

1. Access your **Procurement Workspace** and click **Create Standalone Document** in the Secondary Navigation Panel.
2. Expand the **Create Standalone Solicitation** section. Click **Request For Proposal (RFP)**. The Document Catalog opens.
3. Click **Create**.



4. Enter the following required fields:

| Required Fields | Values |
|-----------------|------------------|
| Dept | See Student Card |
| Unit | UNIT |

5. Click **Auto Numbering**.

6. Click **Create**. The document opens to the **Header** page.
7. Complete the required fields in the Solicitation document **Header**.

Action Menu

[Load Vendor List](#) [Load T and C](#)
[Assemble Document](#) [View Assembly Request](#)

▼ **General Information**

Record Date :

Document Description :

Vendor List Restricted Responses? : ☐

Prohibit Online Responses : ☒

Procurement Folder : 35601

Procurement Type :

PSC

Default Form :

System Gen List : false

Let Date : 05/07/2006

Published Date :

Published Time :

Close Date : 05/07/2006

Close Time : 11:30

► **Contact**

► **Templates**

► **Add Templates**

► **Reference Documents**

| Required Fields | Values |
|----------------------|---|
| Document Description | Enter "Pre-Sentence Investigation writers" . |
| Procurement Type ID | Select "17" from the Pick-List for Personal Service Contracts. |

8. Complete the **Contact** section

Contact

Issuer ID :

eMARS Student 758
888-888-8888
student@ky.gov
Cap Center

Requestor ID :

Name :
Phone Number :
Email :
Cap Center

Team ID :
Buyer :
Buyer Dept :

| Required Fields | Values |
|-----------------|---|
| Issuer ID | Defaults to your ID. |
| Requestor ID | Select your Student-id from the Pick-List as the Requestor. |

9. Complete the **Terms and Conditions** Component.

10. Navigate to the eMARS website at <http://finance.ky.gov/internal/eMARS/> and click on the **Procurement Functional Area**.

eMARS - enhanced Management Administrative Reporting System

10/30/2008 - eMARS Newsletter Issue 23 just released. Click the [Newsletters](#) link below for more

| | | |
|--|---|--|
| <h2>Applications</h2> <ul style="list-style-type: none"> eMARS (Financial Production) <h2>Year-End Info</h2> <ul style="list-style-type: none"> Fiscal Year 2009 Monthly Closing Schedule (09/02/08) 2008 Year-End Information (links related to year-end documentation such as allotment listings; pending transactions in eMARS; procedures, guidelines, communications, etc.) (07/03/08-1:18PM) Annual Closeout Info (06/16/08) | <h2>Training</h2> <ul style="list-style-type: none"> eMARS End-User Training (Training resources e.g. Catalog, ISGs, Materials, Manuals, Registration, Schedule) (10/01/08) <h2>Support Orgs</h2> <ul style="list-style-type: none"> Controller's Office Commonwealth Office of Technology Customer Resource Center Office of Procurement Services Statewide Accounting | <h2>Functional Areas</h2> <ul style="list-style-type: none"> Cost Accounting (08/23/06) Chart of Accounts (COA) Plan (08/08/06) Financial (08/03/06) Fixed Assets (11/10/08) update Interfaces (08/01/06) Procurement (i.e. Personal Service Templates) (10/06/08) update Reporting (11/12/06) update Vendor Self Service (VSS) Security/Workflow Approvals (05/19/06) |
|--|---|--|

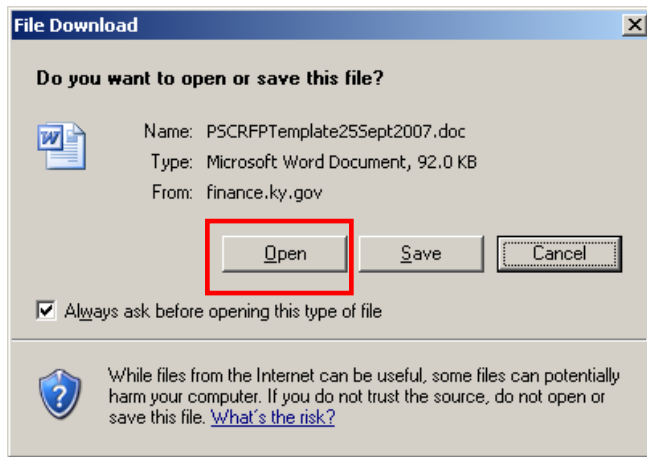
Procurement

Terms and Conditions Templates

The following templates have been created by the Office of Procurement Services to replace the PSC1 Terms and Conditions.

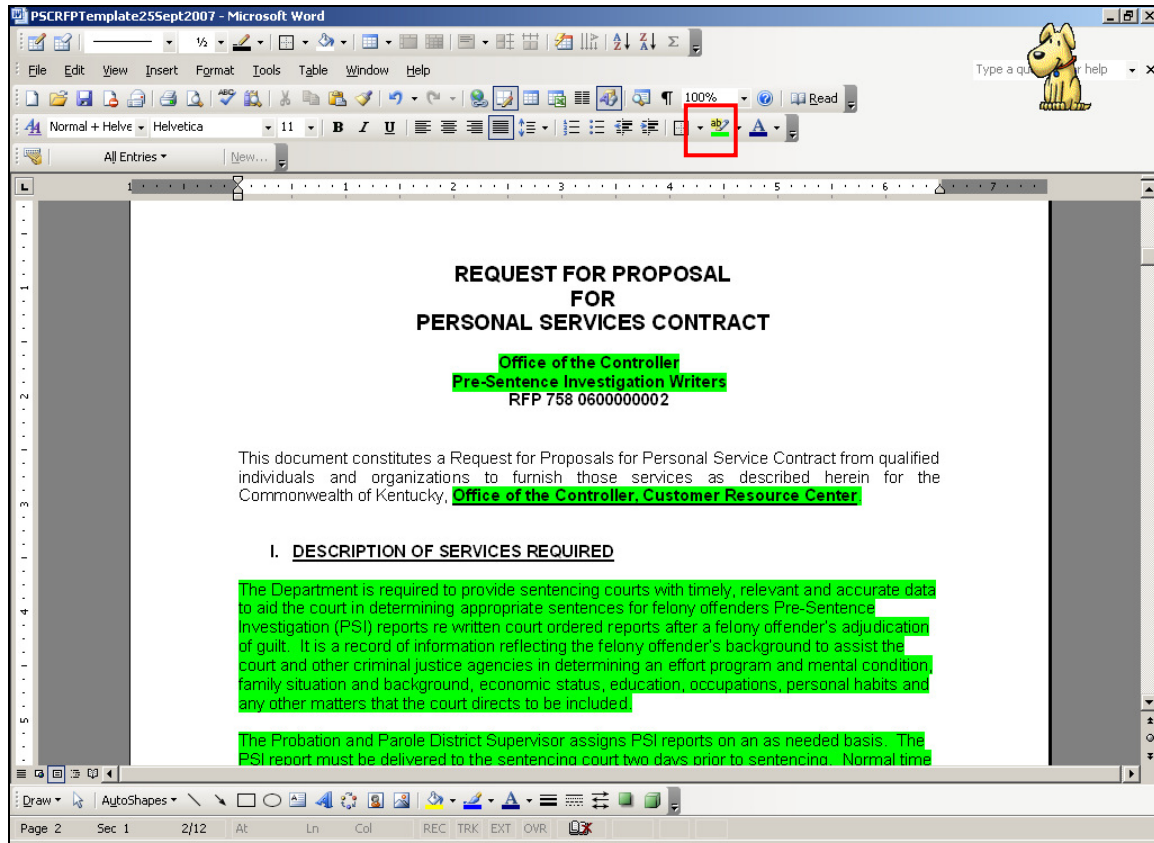
- **Professional Services (RFP)** (10/06/08) **update**
- **Personal Service Contracts (PSC)** (10/06/08) **update**

11. Select the **Professional Services (RFP)** template and **Open** a copy of the template that we will modify.

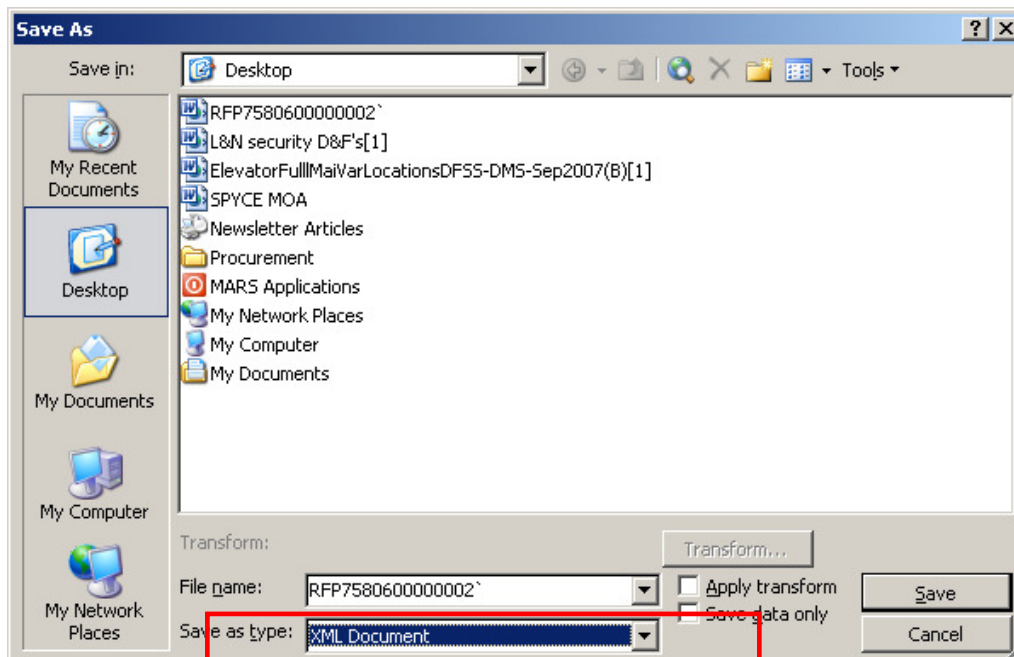


12. Modify only the highlighted sections of the document to make it specific to the agency and the RFP

| Required Fields | Values |
|---|---|
| Name of Agency | Enter: "Office of the Controller" |
| Title of RFP | Enter: "Pre-Sentence Investigation Writers" |
| RFP Number | Enter Your RFP Document ID |
| Description of Services To Be Performed | Enter: "The Department is required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders." |



13. After changing the information in the Template to correspond with your RFP remove all Highlighting from the document by selecting all text (Ctrl + A) and remove the highlight.
14. Save the document to your local desktop as **.XML** and close your document.



15. Navigate to the **Terms and Conditions** section your RFP and click **Insert New Line**. When the record has been added click on the **arrow** next to the T & C field and select the **Free Form** from the pick list.

NOTE: By selecting the Free Form Terms and Conditions the system allows you to attach your own **.XML** document to your **RFP** rather than a system standard. When the Free Form template is used a blank document will be incorporated into the Attachments section of the RFP Terms and Conditions.

RFP 758 0700000002 1
Document View
Header
Schedule of Events
✓ Terms and Conditions
Commodity Group
Commodity
Commodity T & C
Evaluation Criteria Group
Evaluation Criteria Line
Vendor List
Free Form Vendor
Vendor Rotation
Commodity E-mail Push
Publishing
Supporting Documents
Document Comments
Document History
Document Reference
Future Triggering

RFP - 758- 0700000002- 1- New- Draft

Action Menu

| Section | T & C | Name | Inc By | Free Form Flag |
|---------|-------|------|-----------|----------------|
| ✂ | ✓ 1 | FREE | Free Form | by full text |

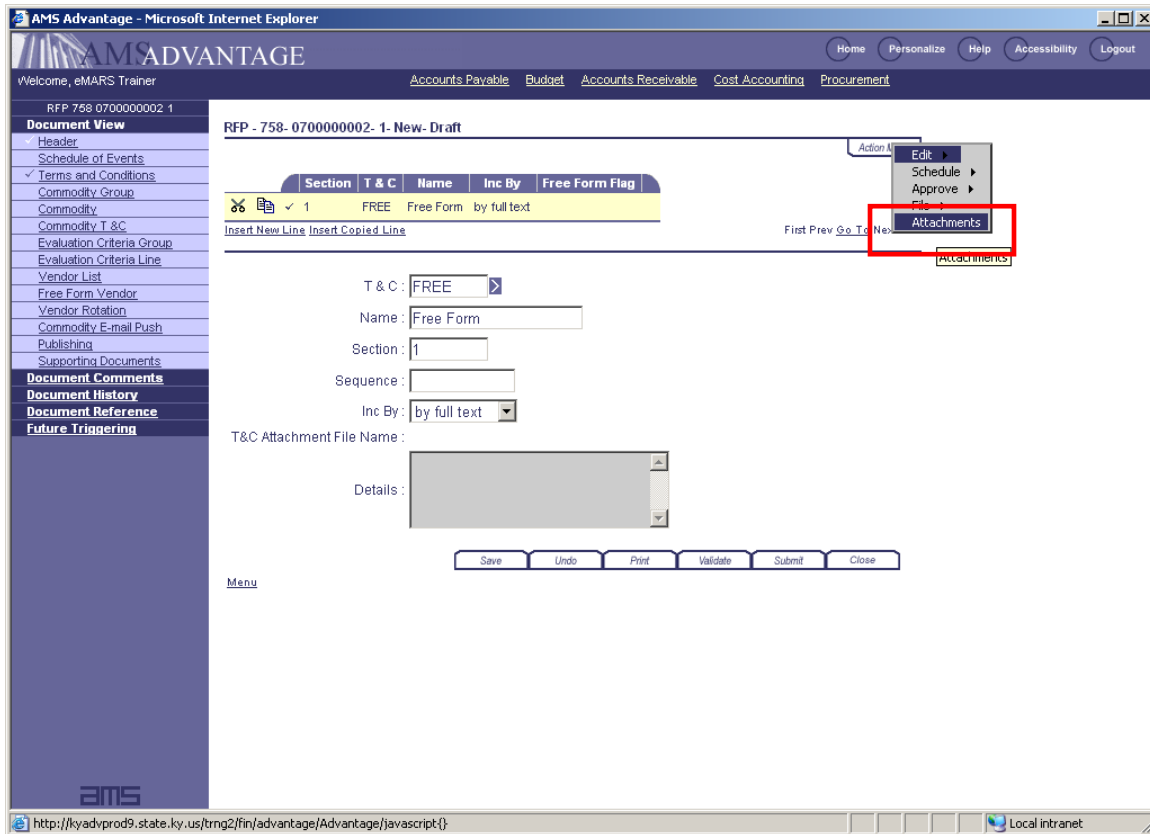
Insert New Line
Insert Copied Line

First Prev Go To Next Last

T & C : FREE >
Name : Free Form
Section : 1
Sequence :
Inc By : by full text
T&C Attachment File Name :
Details :

Save
Undo
Print
Validate
Submit
Close

16. Click the **Attachments** link from the **Action Menu**. This will allow you to attach your copy of the desired **RFP** template that you created.

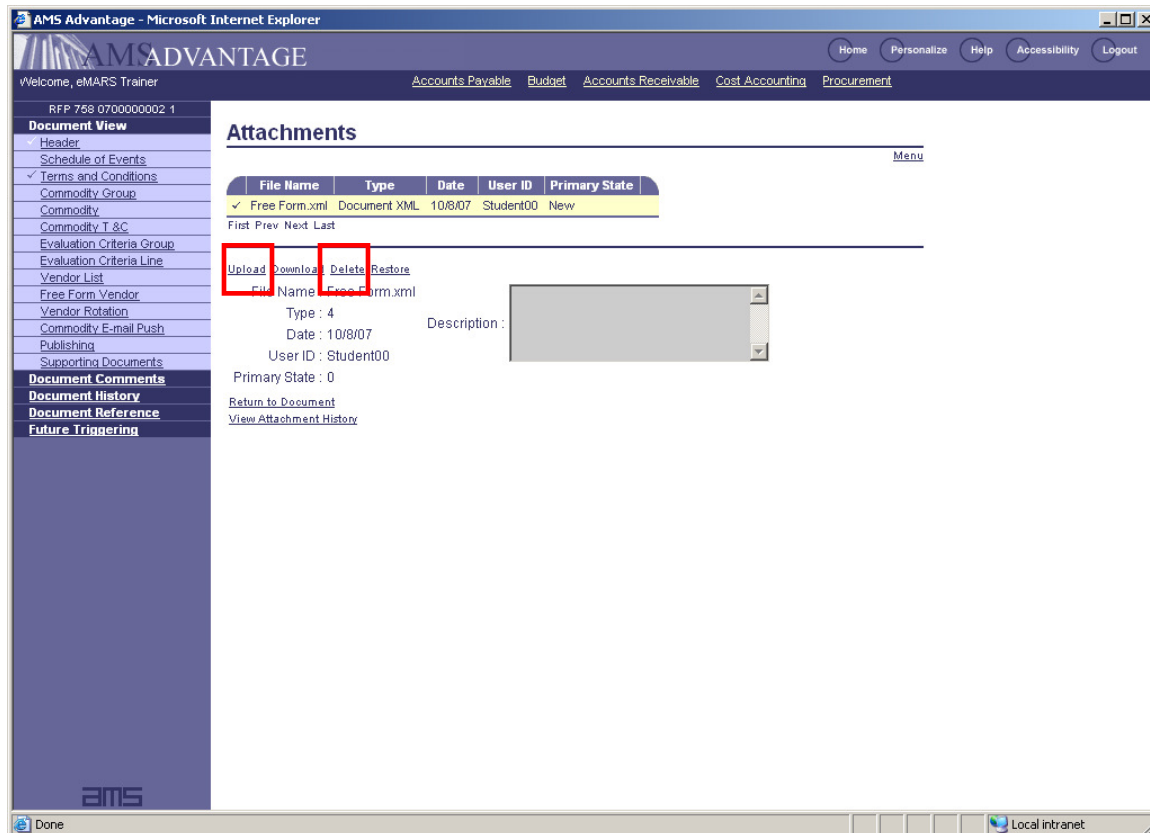


The screenshot shows the AMS Advantage web application interface. The top navigation bar includes links for Home, Personalize, Help, Accessibility, and Logout. The main content area displays the 'RFP - 758-0700000002- 1- New- Draft' form. On the left, a sidebar menu lists various document management options. The main form area contains a table with columns for Section, T & C, Name, Inc By, and Free Form Flag. Below the table, there are input fields for T & C, Name, Section, Sequence, Inc By, and T&C Attachment File Name. An 'Action Menu' is visible in the top right corner of the form area, with the 'Attachments' option highlighted by a red rectangle. At the bottom of the form, there are buttons for Save, Undo, Print, Validate, Submit, and Close.

17. The **Attachment** page opens. Click **Delete** to discard the blank document brought in when Free Form was selected from the T & C picklist.

NOTE: When the Free Form template is used a blank document will be incorporated into the Attachments section of the RFP Terms and Conditions. This blank attachment will need to be deleted in order to Upload your correct attachment.

NOTE: It is important that you delete the default attachment that is automatically brought in when the Free Form T & C is selected. If the default is not deleted it may cause problems during the assembly process.



18. Click **Upload** to attach your RFP Template you created in step 12.

19. **Browse** your local hard files for the RFP Template that has been saved as an XML document. When your document has been found click **Open** to incorporate it into your Solicitation.

NOTE: Make sure that the Attachment Type of **Document XML** is selected. The Attachment Type of Document XML will be required for all attachments that are included in the Terms and Conditions and Supporting Documents Sections.

Upload Attachment

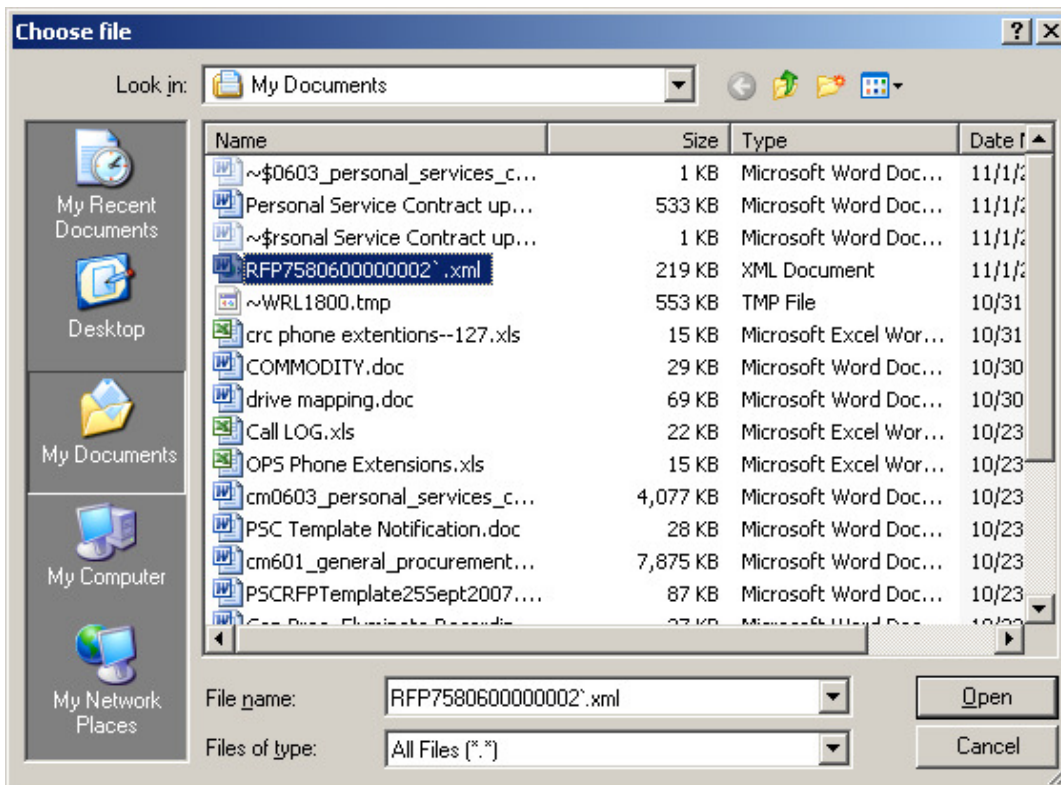
[Menu](#)

[Upload](#) [Cancel](#)

Attachment File :

Description :

Attachment Type : Document XML



20. Once you have located and selected the file click **Upload**.

Upload Attachment

[Menu](#)

Upload [Cancel](#)

Attachment File :

Description :

Attachment Type : Document XML

Attachments [Menu](#)

| File Name | Type | Date | User ID | Primary State |
|------------------------|--------------|---------|-----------|---------------|
| ✓ RFP7580600000002.xml | Document XML | 11/1/07 | Student00 | New |

First Prev Next Last

[Upload](#) [Download](#) [Delete](#) [Restore](#)

File Name : RFP7580600000002.xml
 Type : 4
 Date : 11/1/07
 User ID : Student00
 Primary State : 0

[Return to Document](#)
[View Attachment History](#)

21. Once the upload has completed successfully, click **Return to Document** to be transitioned back to the Terms and Conditions section of the RFP. Once there you will notice that the T & C Attachment File Name has changed to your new file. eMARS will use this new file in the bid package/print out.

RFB - 758- 0700000002- 1- New- Draft [Action Menu](#)

| Section | T & C | Name | Inc By | Free Form Flag |
|---------|-------|------|-----------|--------------------|
| ✂ | ✓ 1 | FREE | Free Form | by full text false |

[Insert New Line](#) [Insert Copied Line](#) First Prev [Go To](#) Next Last

T & C:

Name:

Section:

Sequence:

Inc By:

T&C Attachment File Name : RFP7580600000002.XML

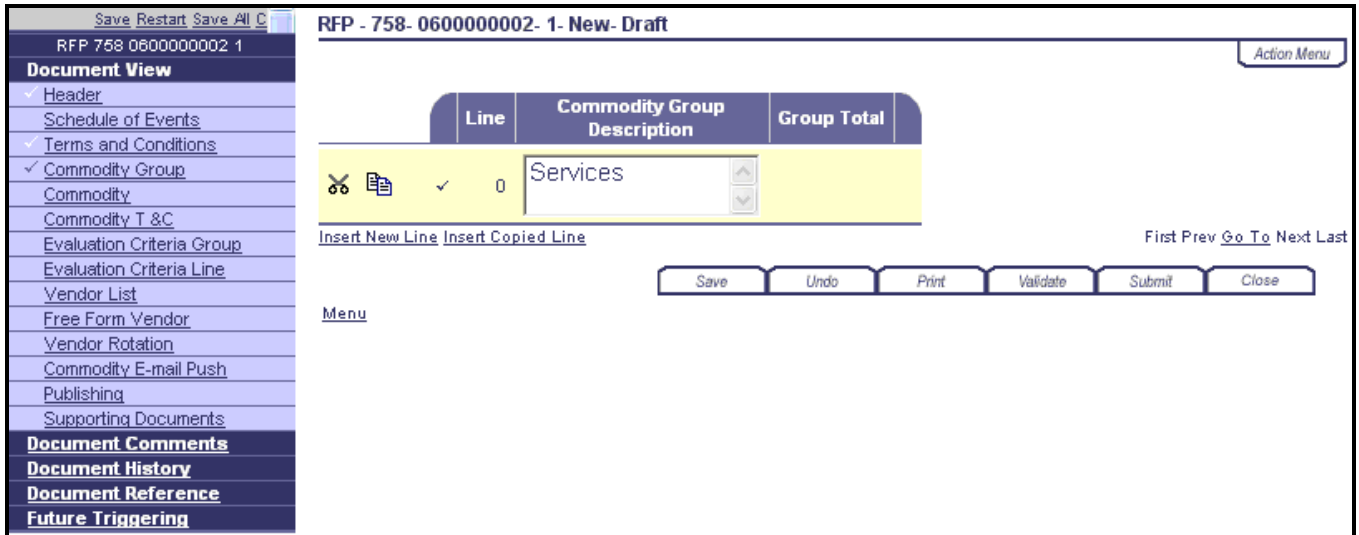
Details:

[Save](#) [Undo](#) [Print](#) [Validate](#) [Submit](#) [Close](#)

[Menu](#)

22. Create **Commodity Groups**. Click on **Commodity Groups** in the Secondary Navigation Panel.

NOTE: A default group is always created.



Save Restart Save All C

RFP 758 0600000002 1

Document View

- ✓ Header
- Schedule of Events
- ✓ Terms and Conditions
- ✓ Commodity Group
- Commodity
- Commodity T & C
- Evaluation Criteria Group
- Evaluation Criteria Line
- Vendor List
- Free Form Vendor
- Vendor Rotation
- Commodity E-mail Push
- Publishing
- Supporting Documents
- Document Comments**
- Document History**
- Document Reference**
- Future Triggering**

RFP - 758- 0600000002- 1- New- Draft

Action Menu

| Line | Commodity Group Description | Group Total |
|------|-----------------------------|-------------|
| 0 | Services | |

Insert New Line Insert Copied Line

First Prev Go To Next Last

Save Undo Print Validate Submit Close

Menu

23. For a single **Commodity Group**, change the **Commodity Group** Description from “Default” to “Services”.
24. Click on the **Commodity** link in the Secondary Navigation Panel to create the Commodities associated with the **Commodity Group**. The **Commodity** section opens.

25. Click **Insert New Line**, and complete the required fields for the **General Information** Section.

RFP - 758- 0600000002- 1- New- Draft

Action Menu

Load T & C Commodity

| Line | CL Description | Line Amount | Marked Delete? |
|------|------------------------|-------------|----------------|
| 1 | PSI Writer District 10 | \$525.00 | false |

Insert New Line Insert Copied Line

First Prev Go To Next Last

Commodity Line Group : 1 >

General Information

CL Description : PSI Writer District 10

Commodity : 99052
Investigative Services

Line Type : Service

Quantity :

Unit :

Unit Price :

Contract Amount : \$525.00

Service From : 04/19/2006

Service To : 04/30/2007

Catalog :

Effective From :

Effective To :

Marked Delete? : ☐

Commodity Specs :

Extended Description : The Department of Corrections, Division of Probation and Parole, is required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders.

Line Amount : \$525.00

More Text

Reference

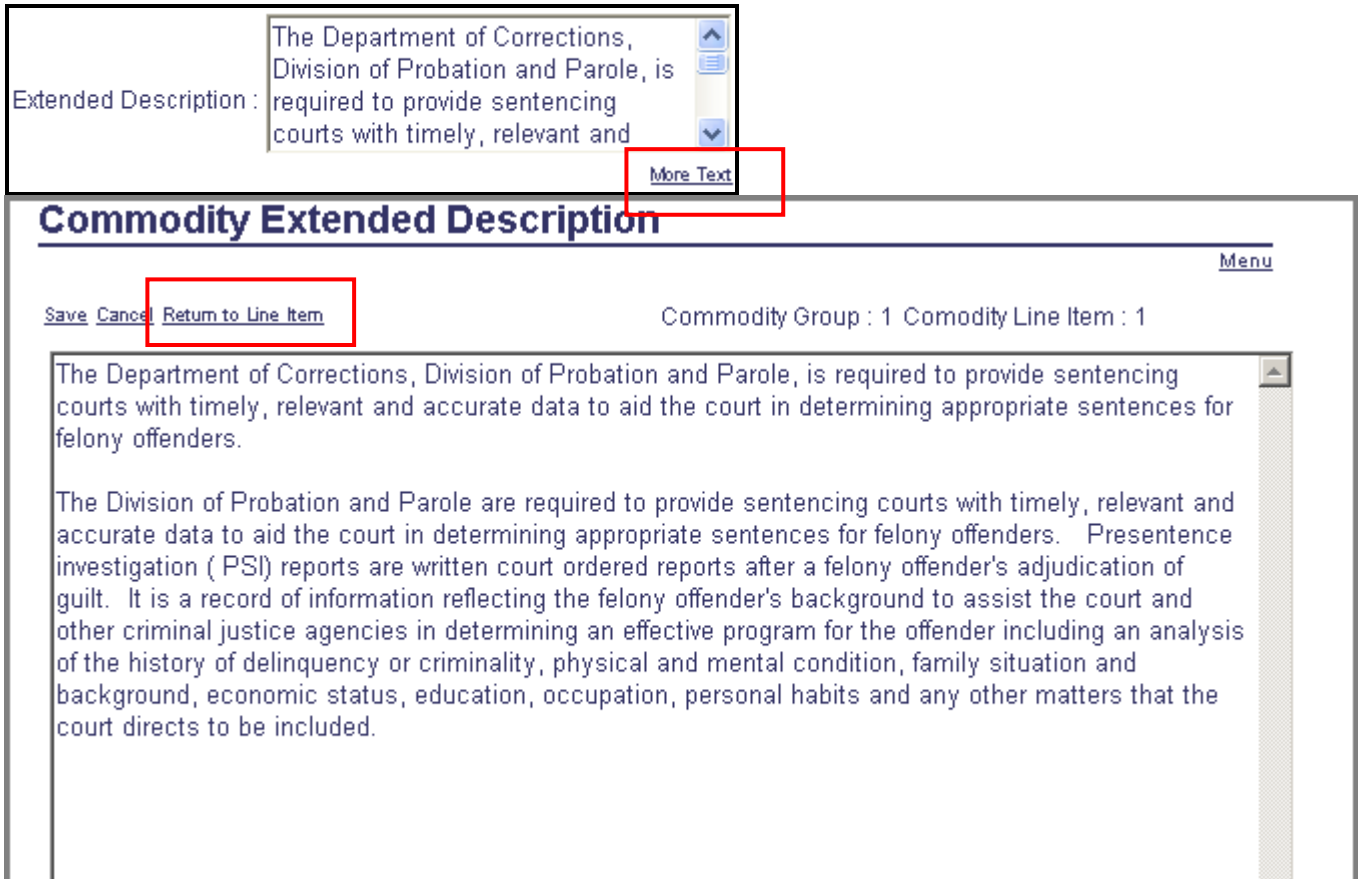
Shipping/Billing

Specifications

| Required Fields | Values |
|----------------------|--|
| CL Description | Enter "PSI Writer District 10". |
| Commodity | Select 99052 from the pick list. |
| Line Type | Pick "Service" from the list |
| Contract Amount | Enter \$1200.00 |
| Service From | Enter One Month from Today |
| Service To | Enter Two Months from Today |
| Extended Description | Enter: "The Department of Corrections, Division of Probation and Parole, is required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders." NOTE: To insert a TAB into the Extended Description field, type [Ctrl]+[Tab]. |

26. Click the **More Text** link to display a larger Extended Description window. Enter the following additional text:

“The Division of Probation and Parole are required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders. Pre-sentence investigation (PSI) reports are written, court ordered reports after a felony offender's adjudication of guilt.”



Extended Description : The Department of Corrections, Division of Probation and Parole, is required to provide sentencing courts with timely, relevant and

[More Text](#)

Commodity Extended Description

[Menu](#)

[Save](#) [Cancel](#) [Return to Line Item](#)

Commodity Group : 1 Comodity Line Item : 1

The Department of Corrections, Division of Probation and Parole, is required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders.

The Division of Probation and Parole are required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders. Presentence investigation (PSI) reports are written court ordered reports after a felony offender's adjudication of guilt. It is a record of information reflecting the felony offender's background to assist the court and other criminal justice agencies in determining an effective program for the offender including an analysis of the history of delinquency or criminality, physical and mental condition, family situation and background, economic status, education, occupation, personal habits and any other matters that the court directs to be included.

27. Click the **Return to Line Item** link.

28. Complete the **Shipping/Billing** Information.

Shipping Location : 1514

Billing Location : 1515

Attention :
130
4011 FORT CAMPBELL BLVD
105 HAMMOND PLAZA
HOPKINSVILLE
KY
42241
US

Attention :
130
4011 FORT CAMPBELL BLVD
105 HAMMOND PLAZA
HOPKINSVILLE
KY
42241
US

Additional Info :

Additional Info :

Shipping Method :

Free On Board :

Delivery Date :








Delivery Type :

Enter the following required fields:

| Required Fields | Values |
|-------------------|--|
| Shipping Location | Select the 1514 from the pick list. |
| Billing Location | Select 1515 from the pick list. |

29. **Create Evaluation Criteria.** Click **Evaluation Criteria Line** in the Secondary Navigation Panel. This section allows you to define specific considerations for evaluating responses and applies a point value for each. You will create four **Evaluation Criteria** in this example: Price, Qualifications, Experience and Scope of Work.

RFP - 758- 0600000002- 1- New- Draft
Action Menu

| | Line | Criteria | Short Description | Points | Free Form Flag | Marked Delete? |
|---|------|----------|-------------------|--------|----------------|----------------|
|   | 1 | PRICE | Lowest Price | 20 | false | false |
|   | 2 | QUAL | | 40 | true | false |
|    | 3 | EXP | | 40 | true | false |

Insert New Line
Insert Copied Line
First Prev Go To Next Last

Evaluation Criteria Group : 1 >

Criteria :

Short Description : EXP

Description : Experience writing pre-sentencing reports

Response Type : Text

Points : 40

Marked Delete? : ☐

Mandatory YES Answer : ☐

30. Click **Insert New Line** to enter the first Evaluation Criteria.

| Required Fields | Values |
|-----------------------------|---|
| Criteria | Select “ Price ” from the pick list for the first criteria. |
| Short Description | Used to describe the briefly describe the Evaluation criteria. This fields will be populated if a pre-defined Evaluation criteria has been selected from the pick list. Leave as Defaulted |
| Description | Leave as Defaulted |
| Response Type | Defaults to “ Text ” |
| Points | Used to determine how many points may be awarded to a Vendor for the Response they’ve provided. It is used as part of the Evaluation process to determine which vendor will receive the award. Enter “ 20 ” |
| Marked Delete? | Leave blank for all criteria |
| Mandatory YES Answer | Leave blank for all criteria |

31. Click **Insert New Line** to enter in the second **Evaluation Criteria**.

| Required Fields | Values |
|-----------------------------|---|
| Criteria | Leave Blank |
| Short Description | Used to describe the briefly describe the Evaluation criteria. This fields will be populated if a pre-defined Evaluation criteria has been selected from the pick list. Enter “ QUAL ” |
| Description | Enter “ Qualifications and Training ” |
| Response Type | Select “ Text ” |
| Points | Used to determine how many points may be awarded to a Vendor for the Response they’ve provided. It is used as part of the Evaluation process to determine which vendor will receive the award. Enter “ 40 ” |
| Marked Delete? | Leave blank for all criteria |
| Mandatory YES Answer | Leave blank for all criteria |

32. Click **Insert New Line** to enter in the third **Evaluation Criteria**.

| Required Fields | Values |
|----------------------|--|
| Criteria | Leave Blank |
| Short Description | Used to describe the briefly describe the Evaluation criteria. This fields will be populated if a pre-defined Evaluation criteria has been selected from the pick list. Enter “EXP” |
| Description | Enter “ Experience Writing Pre-Sentencing Reports ” |
| Response Type | Select “ <u>Text</u> ” |
| Points | Used to determine how many points may be awarded to a Vendor for the Response they’ve provided. It is used as part of the Evaluation process to determine which vendor will receive the award. Enter “40” |
| Marked Delete? | Leave blank for all criteria |
| Mandatory YES Answer | Leave blank for all criteria |

33. Click **Insert New Line** to entire in the fourth **Evaluation Criteria**.

| Required Fields | Values |
|----------------------|--|
| Criteria | Leave Blank |
| Short Description | Used to describe the briefly describe the Evaluation criteria. This fields will be populated if a pre-defined Evaluation criteria has been selected from the pick list. Enter “SOW” |
| Description | Enter “ Scope of Work ” |
| Response Type | Select “ <u>Text</u> ” |
| Points | Used to determine how many points may be awarded to a Vendor for the Response they’ve provided. It is used as part of the Evaluation process to determine which vendor will receive the award. Enter “50” |
| Marked Delete? | Leave blank for all criteria |
| Mandatory YES Answer | Leave blank for all criteria |

34. Create the **Free-Form Vendor** list. Select **Free-Form Vendor** from the Secondary Navigation Panel.

[Action Menu](#)

| Line | Vendor Name | Alias/DBA | Principal Contact | Business Type | Default Correspondence |
|------|----------------------------|-----------|-------------------|---------------|------------------------|
| 1 | Robby Burris Investigation | RBI | Robby Burris | | Email |

✂️ 📄 ✓
Insert New Line Insert Copied Line
First Prev [Go To](#) Next Last

Vendor Name :

Alias/DBA :

Business Type : ➤

Address 1 :

Address 2 :

City :

County Code : ➤

County :

State/Province : ➤

Zip :

Country : US

Principal Contact :

Phone :

Fax :

Email :

Default Correspondence : ▼

Comments :

35. Click **Insert New Line** and enter the following required fields:

| Required Fields | Values |
|------------------------|----------------------------|
| Vendor Name | Robby Burris Investigation |
| Alias/DBA | RBI |
| Address 1/Address 2 | 123 Harris County Road |
| City | London |
| State/Province | KY |
| Zip | 40201 |
| Principal Contact | Robby Burris |
| Phone | 606-456-9876 |
| FAX | Leave Blank |
| E-MAIL | Robby.burris@inves_ky.com |
| Default Correspondence | E-Mail |

36. Click **Validate**, but expect errors. You are validating so the **Commodity E-mail Push** page will be populated as expected.
37. Inspect the **Commodity E-mail Push**. Select **Commodity E-mail Push** from the Secondary Navigation Panel. Vendors will receive automatic notification if they have registered for the Commodities listed on this component. This section is automatically populated based on the Commodity Codes in the **Commodity** section. You may also add and delete Commodity Codes as required.

RFP - 758- 0600000001- 1- New- Draft

Action Menu

| Line | Commodity Class | Description |
|------|-----------------|--|
| 1 | 99052 | Investigative Services |
| 2 | 99000 | SECURITY, FIRE, SAFETY, AND EMERGENCY SERVICES |

Insert New Line Insert Copied Line

First Prev Go To Next Last

Save Undo Print Validate Submit Close

Menu

38. Complete the **Publishing** Section. Click **Publishing** from the Secondary Navigation Panel.

Action Menu

Copy Line Select Line

First Prev Go To Next Last

Procurement Folder :
Amendment Number :
Published Date :
Published Time :
Let Date : 05/07/2006
Close Date : 05/07/2006
Close Time : 11:30
Public Bid Opening Date :
Public Bid Opening Time :

Create Vendor Notification : ☒
Schedule of Events : ☒
Terms and Conditions : ☒
Evaluation Criteria : ☒
Evaluation Criteria (Points) : ☐
Amendment History : ☒
Document Attachments : ☒
Publish Vendor List : ☐

Commodity Description : ☒
Item Shipping : ☒
Item Specifications (Handling) : ☒
Item Specifications (Details) : ☒
Commodity Terms and Conditions : ☒
Commodity Attachments : ☒
Prohibit Online Responses : ☒
Restrict Multiple Responses per Vendor TIN : ☒

Top

Menu

Edit Print Copy Forward Close

39. Enter the following required fields:

| Required Fields | Values |
|--|---|
| Let Date | Enter Today's Date |
| Close Date | Enter Today's Date |
| Close Time | Enter time for ½ hour from now. E.g. if it is 10 in the morning enter: 10:30 Note: Closing Time must be supplied in 24hr military time. |
| Public Bid Opening Date (Optional) | Leave blank. |
| Public Bid Opening Time (Optional) | Leave blank. |
| Prohibit Online Responses | Click to select |
| Restrict Multiple Responses per Vendor TIN | Select the flag. |

40. Once all information on the Solicitation has been verified, click **Validate** to check the document for errors.

41. Click **Header**. Click **Assemble Document**. The **Assemble** page will open.

Assemble

| Print Job Code | Print Job Name |
|----------------|----------------|
| ✓ PO2_FORM | Purchase Order |

First Prev Next Last

Application Resource ID : PO2

Print Job Code : PO2_FORM

Print Job Name : Purchase Order

Print Job Description : Purchase Order

[Submit Assemble Request](#) [Cancel](#)

42. Click **Submit Assemble Request.** A batch job will be initiated to Assemble a Draft **PDF** version of the Solicitation.
43. Click **Refresh** until you see that you have a Successful Status.

Assemble Request

[Menu](#) [Back](#) [Refresh](#)

| Request Id | Job Id | User Id | Start Time | End Time | Status | Message |
|------------|--------|---------|---------------------|----------|--------|------------------------------------|
| ✓ 48 | 13123 | mshaw | 05-03-2006 16:16:37 | | | Spooling form data to print server |

First Prev Next Last

[View Job Log Messages](#)

44. Click **Back** to return to the document **Header**. When the job completes go to the **Action Menu>>Attachments** and **Download** the **PDF**.
45. Once finished reviewing the **PDF** file close the window. Once in the Attachments page click **Return To Document** to return to the Header.
46. **Submit** the document to initiate workflow for approval.
47. Write down your document number on your Student Card. You will need this in later exercises.

This page intentionally left blank

5 –Record Vendor Responses Using the Solicitation Wizard (SRW).

Vendor responses are not recorded directly onto the Evaluation document but are instead individually recorded using the Solicitation Response (SR) document or the Solicitation Response Wizard SRW document. These responses are then loaded and consolidated in the Evaluation (EV) document.

Vendor Response using the Solicitation Response Wizard

Access your **Procurement Workspace** and click the **Enter Bid Response** link in the Secondary Navigation Panel. Expand the **Solicitation Response** section. Click **Solicitation Response Wizard (SRWZRD)**. The **Solicitation Response Wizard** page opens.

Enter the Solicitation and Vendor Information on the **SRWZRD** page. The **Solicitation Response Wizard (SRWZRD)** page allows you to initiate the **Solicitation Response Wizard** interface, which enables manual or paper Solicitation Responses from a Vendor to be rapidly entered into the system.

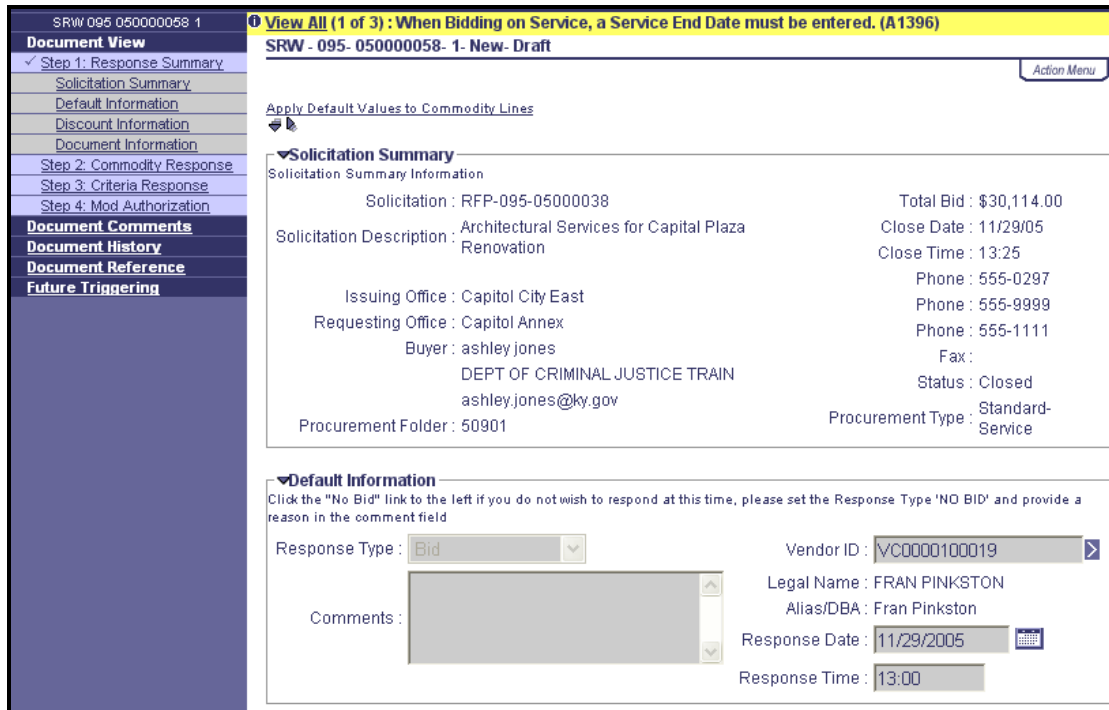


- The **Solicitation Document Code** is the document code from the Solicitation for which you want to record a Response.
- The **Solicitation Department** is the Document Department for the Solicitation for which you want to record a response.
- You may manually type in the **Solicitation Document ID** if you know it or you may search for it by clicking on the **arrow** to expand the pick list. The **Solicitation Document ID** page will open. This page is a filtered list of all those Solicitation documents where the Let Date is less than today's date and the Solicitation has not been awarded. This page will be further

filtered by the values that you have entered in **Solicitation Document Code** field and the **Solicitation Department** field.

- Select the Vendor that is responding to the Solicitation by choosing a **Vendor ID** under the **Solicitation Information** section.

Complete the **Response Summary** – This section displays the solicitation and Vendor information, which was entered on the **SRWZRD** page.



SRW 095 050000058 1

Document View

- Step 1: Response Summary
- Solicitation Summary
- Default Information
- Discount Information
- Document Information
- Step 2: Commodity Response
- Step 3: Criteria Response
- Step 4: Mod Authorization
- Document Comments
- Document History
- Document Reference
- Future Triggering

View All (1 of 3): When Bidding on Service, a Service End Date must be entered. (A1396)

SRW - 095- 050000058- 1- New- Draft

Apply Default Values to Commodity Lines

Solicitation Summary

Solicitation Summary Information

Solicitation : RFP-095-05000038 Total Bid : \$30,114.00

Solicitation Description : Architectural Services for Capital Plaza Renovation Close Date : 11/29/05

Issuing Office : Capitol City East Phone : 555-0297

Requesting Office : Capitol Annex Phone : 555-9999

Buyer : ashley.jones Phone : 555-1111

DEPT OF CRIMINAL JUSTICE TRAIN Fax :

ashley.jones@ky.gov Status : Closed

Procurement Folder : 50901 Procurement Type : Standard-Service

Default Information

Click the "No Bid" link to the left if you do not wish to respond at this time, please set the Response Type 'NO BID' and provide a reason in the comment field

Response Type : Bid Vendor ID : VC0000100019

Legal Name : FRAN PINKSTON

Alias/DBA : Fran Pinkston

Response Date : 11/29/2005

Response Time : 13:00

- There are two required fields in this section: **Response Date** and **Response Time**. The data entered into these fields must be after the **Let Date** and less than the **Closing Date** and **Closing Time** for the referenced solicitation.

NOTE: The Response Time must be supplied in 24hr military time (e.g. 9:30am=09:30, 2:00pm=14:00).

- The **Legal Name** and **Alias/DBA** for the Vendor are inferred from the **VCUST** table. Users may optionally enter prompt payment discounts and optionally record default **Response Types** as well as default **Comments**. If **Response Types** and **Comments** have been entered, and the **Apply Default Values to Commodity Lines** link is clicked, the system will populate the corresponding values on the Step 2: **Commodity Response** section upon saving.

Complete the **Commodity Response** grid – This section displays all Commodity line items for all Commodity Groups from the referenced solicitation. Up to 15 Commodity line items can be displayed in the grid. If there are more than 15 Commodity line items, then you can navigate between the records by clicking the **Next**, **Previous**, **First**, and **Last** links. The rows in the grid are sorted by Group and then by Line Number.

SRW - 095- 050000058- 1- New- Draft Action Menu

Commodity Line

| Group | Line # | Line Description | Response Type | Line Type | Unit | Unit Price | Contract Amount |
|-----------|--------|---|---------------|-----------|------|------------|-----------------|
| ✓ Default | 1 | Architectural Services for Capital Plaza Renovation | Bid | Service | | | \$30,000.00 |
| Default | 2 | Travel Expenses | Bid | Item | MI | 0.380000 | |

Previous Step
Next Step
First Prev Go To Next Last
Cancel

Save
Undo
Print
Validate
Submit
Close

Menu

The **Line Type** determines the required fields for each Commodity line, as outlined in the table below.

| If the Line Type is: | Then the Required Fields are: |
|----------------------|--|
| Item | Response Type, Unit, Unit Price, Delivery Days |
| Service | Response Type, Bid Contract Amount |
| Discount | Response Type, Discount %, Effective To, Effective From, Bid Catalog |
| Catalog | Response Type, Discount %, Effective To, Effective From, Bid Catalog |

- The **Response Type** for each Commodity line defaults to “Bid”, but can be changed. You can optionally enter data into the **Comments** field. If the **Response Type** for any of the above line types is “No-bid” then you should only enter text in the **Comments** field; however, the system will not prevent you from entering data in the other fields.
- You may use the **TAB** key to navigate through the grid. Selecting the **TAB** key will advance the user to the next required field based on line type. If the cursor is in the last required field for a row then typing the **TAB** key will transition to the cursor to the first row on the next line.

Complete the **Criteria Response** grid. This section displays all **Evaluation Criteria** lines for the different Criteria Groups from the referenced Solicitation. Up to 15 criteria lines can be displayed in the grid. If there are more than 15 lines, then you can navigate between the records by clicking the **Next**, **Previous**, **First**, and **Last** links. The rows in the grid are sorted by Group and then by Criteria Number. Only the required fields for each Line Item Type are editable.

SRW - 758-060000084- 1- New- Draft

Action Menu

| Group | Line # | Short Description | Response Type | Date Response | Number Response | Yes/No Response | Text Response |
|-----------|--------|-------------------|---------------|---------------|-----------------|-----------------|--------------------------------|
| ✓ Default | 1 | Experience | Text | | | | 15 yers |
| Default | 2 | Services | Text | | | | immediate |
| Default | 3 | Qualifications | Text | | | | member of local business guild |

First Prev Go To Next Last

Previous Step Next Step Cancel

The **Response Type** for each criteria on the Solicitation determines which response field is required on the **SRW**.

| If the Response Type is: | Then the Required Fields is: |
|--------------------------|---|
| Date | Date Response (mm/dd/yyyy) |
| Number | Number Response (any numeric value) |
| Yes/No | Yes/No Response |
| Text | Text Response (Can be any combination of text and numbers up to 256 characters) |

Click **Validate** and then **Submit** to finalize the **SRW** document. When you close the document you will transition back to the **SRWZRD** page where you can enter a response for a new Vendor without retyping the Solicitation ID.

How to print the SRW document:

1. Select **Print** located at bottom of page.
2. Print page opens, Click **Print** and print job returns "Submitted Successfully".
3. On the Action Menu, select "**Attachments**"
4. Highlight a row that has the Document ID on it (do not highlight the row with **XML** in it)
5. Select **Download**. You should get a pop-up window (assuming you have Adobe on your PC) asking you to either open or save the file.
6. Select **Open**. This will open a session of Adobe and open the file.
7. Print the document from Adobe.

NOTE: Approvals are not required for **Solicitation Response Wizard (SRW)** documents. They will Submit to Final.

If you need to modify a finalized **SRW** you must complete the Mod Authorization step.

SRW - 758- 060000085- 2- Modification- Draft

Action Menu

| Line | Modified On | Modified By | Authorized By |
|----------|-------------|-------------|---------------|
| ✂️ 📄 ✓ 1 | 03/09/2006 | mshaw | |

First Prev Go To Next Last

Reason :

typographical error detected

Authorized On : 3/24/2006

Authorized By : MSHAW

Auth Method : verbal

Modified On : 03/09/2006

Modified By : mshaw

Previous Step

Cancel

- In order to submit a modification to a **SRW** document, you must describe the reason for the modification in the **Reason** field
- List who authorized the modification in the **Authorized By** field
- Record the date the modification was authorized in the **Authorized On** field.



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Exercise 2 – Record a Vendor Response to the RFP using the SR Wizard (SRW).

Scenario

You have received several paper responses to the **RFP** you created in Exercise 1. You must record these responses into the system.

Task Overview

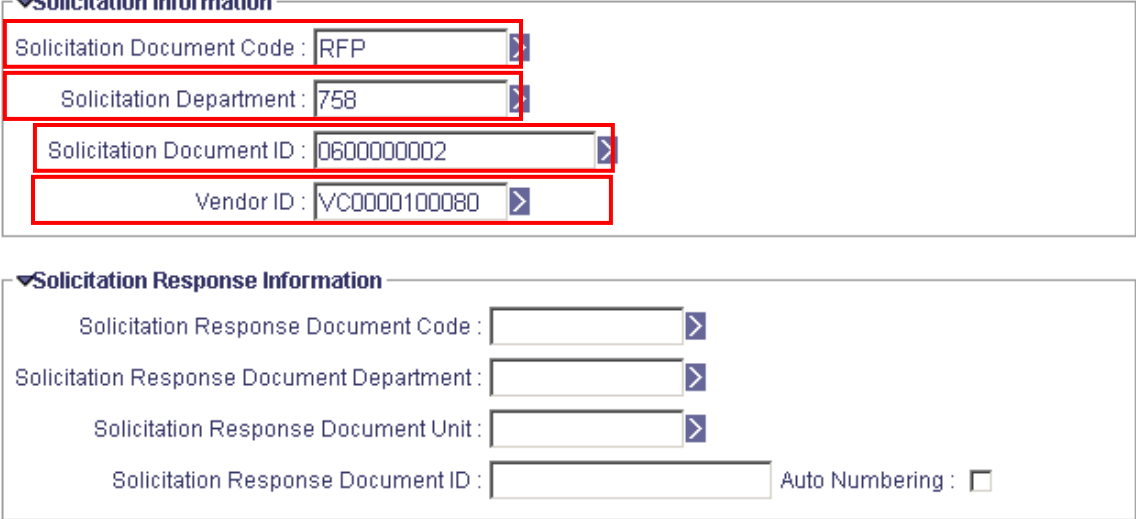
You will access the **Solicitation Response Wizard** page from your **Procurement Workspace** and initiate two Vendor Responses to the **RFP** document you created in Exercise 1. You will record the Vendors price proposals and enter Vendor Responses to the **Evaluation Criteria**.

Procedures

1. Access your **Procurement Workspace** and click **Enter Bid Response** in the Secondary Navigation Panel. Expand the **Solicitation Response** section.
2. Click **Solicitation Response Wizard (SRWZRD)**. The **Solicitation Response Wizard** page will open.
3. Enter the Solicitation and Vendor Information on the **SRWZRD** page. The **Solicitation Response Wizard (SRWZRD)** page allows you to initiate the **Solicitation Response Wizard** interface, which enables manual or paper Solicitation Responses from a Vendor to be rapidly entered into the system.

Solicitation Response Wizard

[Menu](#)



The form is divided into two main sections: 'Solicitation Information' and 'Solicitation Response Information'. The 'Solicitation Information' section contains four input fields: 'Solicitation Document Code' (value: RFP), 'Solicitation Department' (value: 758), 'Solicitation Document ID' (value: 0600000002), and 'Vendor ID' (value: VC0000100080). The 'Solicitation Response Information' section contains four input fields: 'Solicitation Response Document Code', 'Solicitation Response Document Department', 'Solicitation Response Document Unit', and 'Solicitation Response Document ID'. There is also an 'Auto Numbering' checkbox. At the bottom, there are two buttons: 'Create Response' and 'Find Responses in Progress'.

| | |
|---|--------------------------|
| Solicitation Document Code : | RFP |
| Solicitation Department : | 758 |
| Solicitation Document ID : | 0600000002 |
| Vendor ID : | VC0000100080 |
| Solicitation Response Information | |
| Solicitation Response Document Code : | |
| Solicitation Response Document Department : | |
| Solicitation Response Document Unit : | |
| Solicitation Response Document ID : | |
| Auto Numbering : | <input type="checkbox"/> |

[Create Response](#)[Find Responses in Progress](#)

| Required Fields | Values |
|---|--|
| Solicitation Document Code | Enter "RFP" . |
| Solicitation Department | Type in the department from your Student Card. |
| Solicitation Document ID | Open the pick list and select the RFP you created in Exercise 1. |
| Vendor ID | Search for and select "Bluegrass Investigators" from the pick list. |
| Solicitation Response Document Code | Leave blank. |
| Solicitation Response Document Department | Leave blank. |
| Solicitation Response Document Unit | Leave blank. |
| Solicitation Response Document ID | Leave blank. |

- Click **Create Response**.
- Complete the **Response Summary** section. This section displays the Solicitation and Vendor information, which was entered on the **SRWZRD** page.

SRW 670 0600000008 1

Document View

- ✓ Step 1: Response Summary
- Solicitation Summary
- Default Information
- Discount Information
- Document Information
- Step 2: Commodity Response
- Step 3: Criteria Response
- Step 4: Mod Authorization
- Document Comments**
- Document History
- Document Reference
- Future Triggering

SRW - 670- 0600000008- 1- New- Final

Action Menu

[Apply Default Values to Commodity Lines](#)

▼ **Solicitation Summary**

Solicitation Summary Information

| | |
|---|------------------------|
| Solicitation : RFP-670-0600000007 | Total Bid : \$1,150.00 |
| Solicitation Description : Pre-Sentence Investigation Writers | Close Date : 5/7/06 |
| | Close Time : 11:30 |
| Issuing Office : Cap Center | Phone : 888-888-8888 |
| Requesting Office : Cap Center | Phone : 888-888-8888 |
| Buyer : Jamie Bailey | Phone : 502-573-6806 |
| Kentucky Department Of Parks | Fax : |
| jamie.bailey@ky.gov | Status : Awarded |
| Procurement Folder : 35601 | Procurement Type : PSC |

▼ **Default Information**

Click the "No Bid" link to the left if you do not wish to respond at this time, please set the Response Type 'NO BID' and provide a reason in the comment field

| | |
|--|---|
| Response Type : <input type="text" value="Bid"/> | Vendor ID : <input type="text" value="VC0000100079"/> |
| Comments : <input type="text"/> | Legal Name : Bluegrass Investigators |
| | Alias/DBA : |
| | Response Date : <input type="text" value="05/07/2006"/> |
| | Response Time : <input type="text" value="11:20"/> |

| Required Fields | Values |
|-----------------|--|
| Response Date | Enter Today's Date |
| Response Time | Enter a time that is before the Close Time listed in the Solicitation you created in Exercise 1. |

| Other Fields | Values |
|---------------|--|
| Legal Name | Inferred from the VCUST table. |
| Alias/DBA | Inferred from the VCUST table. |
| Response Type | If Response Type and Comments have been entered, and the Apply Default Values to Commodity Lines link is clicked, the system will populate the corresponding values on the Step 2: Commodity Response section upon saving. |
| Comments | |

6. Click **Next Step** and complete **Commodity Response** grid. Enter the required fields below.

SRW - 758- 0600000005- 1- New- Draft

Action Menu

Commodity Line

| Group | Line # | Line Description | Response Type | Line Type | Unit | Unit Price | Contract Amount |
|-----------|--------|------------------------|---------------|-----------|------|------------|-----------------|
| ✓ Service | 1 | PSI Writer District 10 | Bid | Service | | | 1150.00 |

Previous Step

Next Step

Cancel

First Prev Go To Next Last

Save

Undo

Print

Validate

Submit

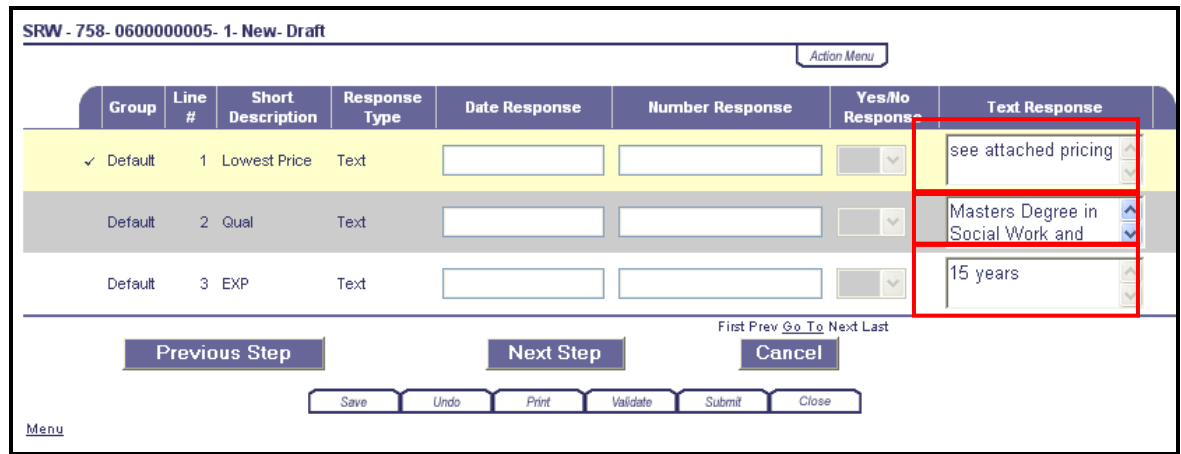
Close

Menu

| Required Fields | Values |
|---------------------|--|
| Response Type | Leave as defaulted. |
| Contract Amount | Enter: \$1150.00 |
| Comments (Optional) | <p>Leave blank.</p> <p>NOTE: If the Response Type for any of the above line types is <i>no-bid</i> then you should only enter text in the Comments field; however, the system will not prevent you from entering data in the other fields.</p> |

NOTE: You may use the **TAB** key to navigate through the grid. Selecting the **TAB** key will advance your cursor to the next required field based on line type. If the cursor is in the last required field for a row then typing the **TAB** key will transition to the cursor to the first row on the next line.

- Click **Next Step** and Complete the **Criteria Response** grid. Enter the Text Response for each criteria.



Enter the following information:

| Required Fields | Values |
|-----------------|---|
| Text Response | For evaluation criteria “PRICE” enter “\$1150.00” |

| Required Fields | Values |
|-----------------|--|
| Text Response | For evaluation criteria QUAL enter “Master Degree in Social work and extensive investigative training” |

| Required Fields | Values |
|-----------------|--|
| Text Response | For Evaluation criteria EXP enter “15 years” |


| Required Fields | Values |
|-----------------|---|
| Text Response | For Evaluation criteria SOW enter “See Documentation on File” |

- Click **Validate** and check for errors. After correcting any errors, click **Submit**.
- Click **Close** and you will be returned to the **SRWZRD** page. You can enter a response for a new Vendor without retyping the Solicitation ID.

10. Record a second Vendor Response for Vendor Tactical Investigations. To select this second Vendor, delete the previous Vendor's code and enter: **"VC0000100080"**

Solicitation Response Wizard

[Menu](#)



Solicitation Information

Solicitation Document Code :

Solicitation Department :

Solicitation Document ID :

Vendor ID :

Solicitation Response Information

[Create Response](#) [Find Responses in Progress](#)

11. Once the second **SRW** opens expand the Default Information and enter in the following information.

| Required Fields | Values |
|-----------------|--|
| Response Date | Enter Today's Date |
| Response Time | Enter a time that is before the Close Time listed in the Solicitation you created in Exercise 1. |

12. Click **Next Step** and complete **Commodity Response** grid. Enter the required fields below.

| Required Fields | Values |
|---------------------|--|
| Response Type | Leave as defaulted. |
| Contract Amount | Enter: \$1200.00 |
| Comments (Optional) | <p>Leave blank.</p> <p>NOTE: If the Response Type for any of the above line types is <i>no-bid</i> then you should only enter text in the Comments field; however, the system will not prevent you from entering data in the other fields.</p> |

13. Click **Next Step** and Complete the **Criteria Response** grid. Enter the Text Response for each criteria.

Enter the following information:

| Required Fields | Values |
|-----------------|--|
| Text Response | For evaluation criteria PRICE enter \$1200 |

| Required Fields | Values |
|-----------------|--|
| Text Response | For evaluation criteria QUAL enter Master Degree in Social work and extensive investigative training |

| Required Fields | Values |
|-----------------|--|
| Text Response | For Evaluation criteria EXP enter 10 years |

| Required Fields | Values |
|-----------------|---|
| Text Response | For evaluation criteria SOW enter SEE DOCUMENTATION ON FILE |

14. Click **Validate** and check for errors. After correcting any errors, click **Submit**.
15. Click **Close** and you will be returned to the **SRWZRD** page.



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6 – Consolidate and Evaluate Vendor Responses on the EV document

The **Evaluation (EV)** document allows you to view responses from Vendors for a specific solicitation. Much of the information on the **Evaluation** document defaults from the Solicitation document. The remaining information comes from the **Solicitation Responses** and from **Evaluator** documents.

The **Evaluation** document consists of a series of sections that display the information collected in various views and totals the scores collected from the **Evaluator** documents for the solicitation. The **Evaluation** document is used to issue awards.

For off-line analysis, eMARS has the ability to generate a Bid-Tabulation in Microsoft Excel which can be printed.

The Evaluation Process

To create the **Evaluation (EV)** document you **Copy Forward** from a **Solicitation** to the **EV** document. Complete the **Document Department**, **Document Unit** and select **Auto-Document Numbering**.

Copy Forward

[Menu](#)

From Document

Category : PROC Doc Dept : 758

Type : SO Doc Unit : UNIT

Code : RFP ID : 0600000002

Select Entire Document : ☒ Version : 1

To Document

Doc. Department Code : 758 Document Id :

Unit Code : UNIT Auto Numbering : ☒

| Target Doc Type | Target Doc Code | Description |
|-----------------|-----------------|--------------------------------|
| SR | SR | Respond to Solicitation |
| SO | RFP | Re-Solicit In Same Procurement |
| ✓ EV | EV | Create EV from SO |

First Prev Next Last

OK Cancel

Load the Responses into the Evaluation document. After the Closing Date has passed you may load all responses into the **EV** for inspection and analysis.



EV 758 0600000007 1

Document View

- Header
- General Information
- Document Creation
- Load Statistics
- Load Statistics Details
- Awarded Items
- Bid Tabulation
- Evaluators
- Solicitation Commodity Line
- Award By Line
- Award by Group
- Award by Total
- Rank by Criteria Group
- Score by Evaluator
- Score by Criteria
- Comments Summary
- Evaluator Comments
- Document Comments
- Document History
- Document Reference
- Future Triggering

EV - 758- 0600000007- 1- New- Draft

[Load Responses](#)

General Information

Solicitation : RFP

Solicitation Dept : 758

Solicitation Number : 0600000002

Procurement Folder : 38801

Personal Service Contract

Pre-Sentence Investigation writers

Buyer Name :

Solicitation Close Date : 04/05/2006

Solicitation Close Time : 10:00

Publish : ☒

Publish Date :

Document Closed Date :

Pricing Attachment Open Date :

Pricing Attachment Open Time :

Created By : mshaw

Created On : 04/05/2006

Modified By : mshaw

Modified On : 04/05/2006

Document Creation

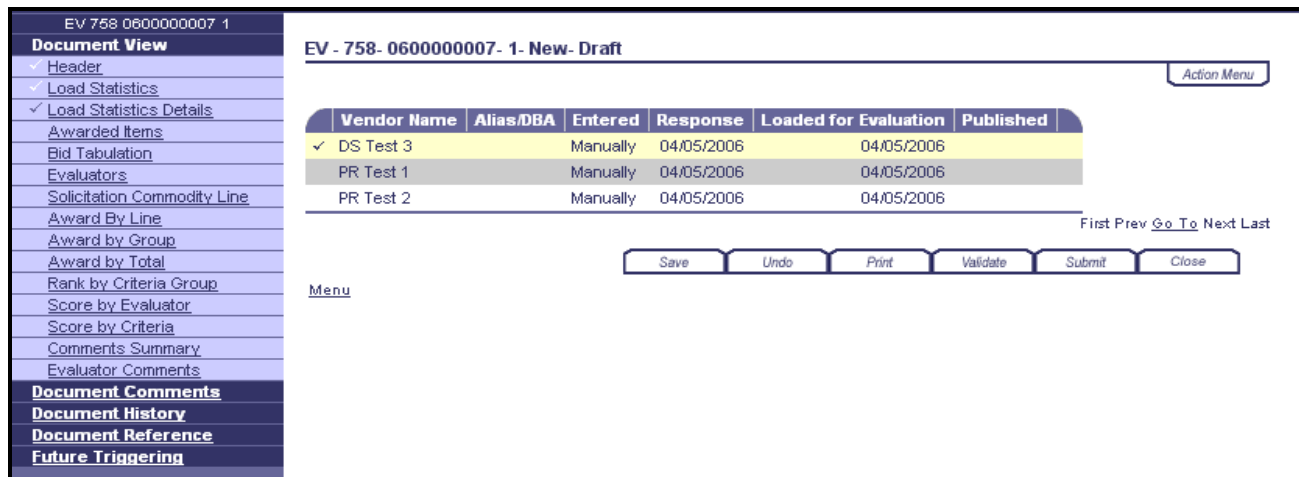
[Top](#)

- Clicking on the **Load Responses** link will bring all **Solicitation Response** documents into the **EV**. This includes **SRW**, **SR** and Bids submitted through **Vendor Self Service**.

NOTE: Responses can only be loaded once the solicitation document has closed.

- The **Publish** check-box on the **EV** document is used to post Public Bid Opening information for a Solicitation document to **Vendor Self Service (VSS)**.

Inspect the **Load Statistics Details** section to see all the Vendors who have responded and which bids have been loaded into the **EV**.



EV 758 0600000007 1

Document View

- Header
- Load Statistics
- Load Statistics Details
- Awarded Items
- Bid Tabulation
- Evaluators
- Solicitation Commodity Line
- Award By Line
- Award by Group
- Award by Total
- Rank by Criteria Group
- Score by Evaluator
- Score by Criteria
- Comments Summary
- Evaluator Comments
- Document Comments
- Document History
- Document Reference
- Future Triggering

EV - 758- 0600000007- 1- New- Draft

[Action Menu](#)

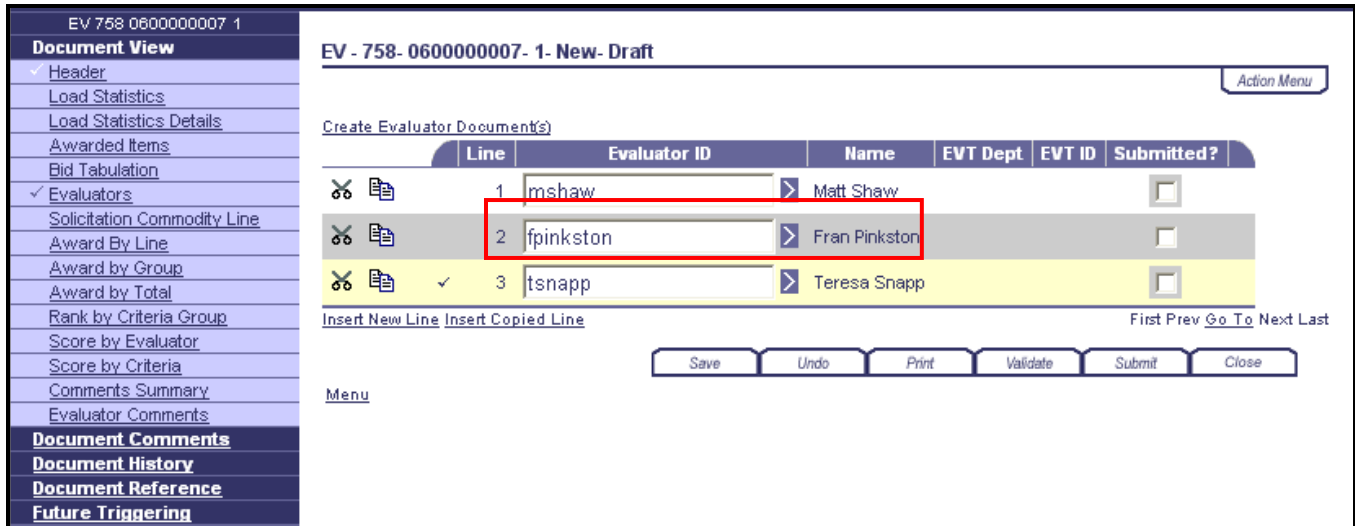
| Vendor Name | Alias/DBA | Entered | Response | Loaded for Evaluation | Published |
|-------------|-----------|----------|------------|-----------------------|-----------|
| DS Test 3 | | Manually | 04/05/2006 | 04/05/2006 | |
| PR Test 1 | | Manually | 04/05/2006 | 04/05/2006 | |
| PR Test 2 | | Manually | 04/05/2006 | 04/05/2006 | |

First Prev Go To Next Last

[Save](#) [Undo](#) [Print](#) [Validate](#) [Submit](#) [Close](#)

[Menu](#)

Build an Evaluation Team (optional). The Evaluator document allows you to establish a Bid-Evaluation team. The purpose of the team is to have experts in the field score and asses Vendor Responses for a given opportunity. Each user identified in the Grid will be sent an e-mail requesting them to completing an **EVT** document that they can locate from the Document Catalog.



- The **Evaluator ID** is the eMARS User-ID of the person selected to perform the evaluation.

Once the Users have been selected click **Create Evaluator Document(s)**

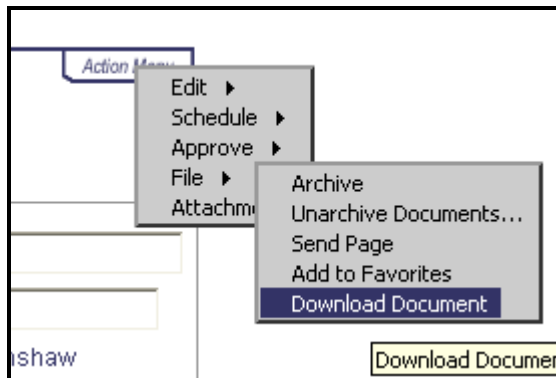
Score Vendor Responses to Evaluation Criteria on the **Score by Criteria** section. This page allows buyers to view and score the Vendors' criteria responses directly on the **EV** document by clicking on the **Load Criteria Line** link. An exchangeable grid is used to switch between Vendors. Evaluations that are entered via the **EVT** document will not display on this section. Click on the **Delete All Lines** action to delete all lines from this section.



- Click on the **Load Criteria Line** link to load in all of the Vendors' responses to Evaluation Criteria.
- Use the **Vendor:** link to toggle between Vendors and score each Vendor's responses.
- Use the **Points Awarded** field to establish a score for each Vendor's Evaluation Criteria response.

Download all Bids into the MS-EXCEL Bid-Evaluation Template. From the **Action Menu**, click on **File>>Download Document**.

NOTE: Excel Macros must be Enabled to generate the Bid-Evaluation Template. Please check the Macro Security before generating the template.



Generate the Bid Tabulation Spreadsheet. Select the **BID EVAL** template and click on the **Generate File** button.

Document Templates

[Menu](#)

[Browse](#) [Clear](#)

Document Department :
Target Application :

Template Name :
Max Download Lines :

Template File Name :

| Document Department | Template Name | Template File Name | Target Application | Max Download Lines |
|---------------------|---------------|--------------------|--------------------|--------------------|
| ✓ ALL | BID_EVAL | BIDTAB.xls | MS-EXCEL | 1000 |

[First](#) [Prev](#) [Next](#) [Last](#)

[Generate File](#) [Back](#)

Inspect the Bid-Tabulation spread-sheet. MS-EXCEL will open with the data from the Vendor's responses tabulated.

The **Total Bid** worksheet displays Vendors ranked lowest to highest based on the total cost of their bid. The lowest Vendor will be placed on the left and the highest will be on the right.

| | A | B | C | D |
|---|-----------|-----------|-----------|-----------|
| 1 | | PR Test 1 | PR Test 2 | DS Test 3 |
| 2 | Line 1 | 1200 | 2500 | 3200 |
| 3 | Total Bid | 1200 | 2500 | 3200 |
| 4 | | | | |
| 5 | | | | |

The **Line Item Group** worksheet consolidates all Vendors responses on a Commodity Group basis. Vendors' Responses to each group will be grouped together and then sorted lowest to highest.

| | A | B | C | D | E |
|---|----------|------------|-------------|------------|------------------|
| | Group No | Group Name | Vendor Name | Bid/No Bid | Group Total Cost |
| 1 | 1 | Services | PR Test 1 | Bid | 1200.00 |
| 1 | 1 | Services | PR Test 2 | Bid | 2500.00 |
| 1 | 1 | Services | DS Test 3 | Bid | 3200.00 |
| 2 | 2 | Travel | DS Test 3 | Bid | 0.00 |
| 2 | 2 | Travel | PR Test 1 | Bid | 0.00 |
| 2 | 2 | Travel | PR Test 2 | Bid | 0.00 |

The **Line Item** worksheet consolidates all Vendor Responses on a Commodity Line by Commodity line basis. All responses to the same line item are grouped together and then sorted in ascending order (e.g. lowest to highest).

| | A | B | C | D | E | F | J | L |
|---|--------|----------------|-----------|--------------|-----------------|------------------------|-----------------|-----------------|
| | Line # | Line Item Type | Vendor | Bid / No Bid | Vendor Comments | Line Description | Contract Amount | Line Item Total |
| 3 | 1 | Service | PR Test 1 | Bid | | PSI Writer District 10 | 1200.00 | 0.00 |
| 4 | 1 | Service | PR Test 2 | Bid | | PSI Writer District 10 | 2500.00 | 0.00 |
| 5 | 1 | Service | DS Test 3 | Bid | Low price bid | PSI Writer District 10 | 3200.00 | 0.00 |
| 6 | | | | | | | | |

Save the MS-EXCEL file to your local file system. You may attach the Bid Tabulation to the Evaluation document for future reference.

Record an Award Justification for each Vendor receiving an award on the **Evaluator Comments** section. At least one comment must exist for all Vendors selected for award. If a comment does not exist an error will be received upon attempted creation of the award document.

EV - 758- 0600000007- 1- New- Draft

Action Menu

✂

📄

✓

| Line | Evaluator | Date | Vendor | Alias/DBA | Comments |
|------|-----------|------------|-----------|-----------|---------------------------------------|
| 1 | Matt Shaw | 04/05/2006 | DS Test 3 | | most qualified for the work in London |

Insert New Line

Insert Copied Line

First

Prev

Go To

Next

Last

Response : DS Test 3 >

Date : 04/05/2006

Comments :

most qualified for the work in London

Save

Undo

Print

Validate

Submit

Close

Menu

- **Comments Box-** Record your award justification in this box.
- Click the **Response: Vendor** link to toggle between Vendors.

Choose how the award will be generated. Awards can be generated one of three ways: Award by Total, Award by Group or Award by Line. You will need to complete only one of these sections to determine who will be granted the award.

If you are awarding the total document to a Vendor you will choose the **Award by Total** section. Award all line items to a Selected Vendor by choosing the Vendor in the Grid section and selecting the **Award All?** check-box. After making the selection in this section, transition to the **Header**, expand the **Document Creation** section, and generate the Award document.

EV - 758- 0600000007- 1- New- Draft

Action Menu

Award by Total

| Line | Vendor Name | Alias/DBA | Adjusted Total | Total Points | All Lines Bid? | Response Link |
|------|-------------|-----------|----------------|--------------|----------------|------------------------------------|
| 1 | PR Test 1 | | | 67 | true | SR,758,06000000005 |
| 2 | DS Test 3 | | | 85 | true | SR,758,06000000007 |
| 3 | PR Test 2 | | | 77 | true | SR,758,06000000006 |

First Prev Go To Next Last

Minority Owned Enterprise : ☐
Women Owned Enterprise : ☐

Total Bid : \$1,200.00
Factor :

Total Points : 67
Adjusted Total :

All Lines Bid? : ☒

Award All? : ☐
Re-Solicit : ☐

Save

Undo

Print

Validate

Submit

Close

- Selecting the **Award All?** check-box indicates that you would like to create an award for the Vendor selected in the grid section for all Commodity Lines on the Solicitation.
- Selecting the **Re-Solicit** check-box indicates that no award will be created.

If you are awarding by Commodity Group(s) you will choose the **Award by Group** section. In the Grid section, select a Group and Vendor with which to create an Award. After making the selection, transition to the **Header**, expand the **Document Creation** section, and generate the Award document.

EV - 758- 0600000007- 1- New- Draft

Action Menu

Award by Group

| | Award | Commodity Group | Vendor | Alias/DBA | Response Type | Total Amount |
|--|-------------------------------------|-----------------|-----------|-----------|---------------|--------------|
| | <input checked="" type="checkbox"/> | Services | PR Test 1 | | Bid | \$1,200.00 |
| | <input type="checkbox"/> | Travel | PR Test 1 | | Bid | \$0.00 |
| | <input type="checkbox"/> | Services | DS Test 3 | | Bid | \$3,200.00 |
| | <input type="checkbox"/> | Travel | DS Test 3 | | Bid | \$0.00 |
| | <input type="checkbox"/> | Services | PR Test 2 | | Bid | \$2,500.00 |
| | <input type="checkbox"/> | Travel | PR Test 2 | | Bid | \$0.00 |

First Prev Go To Next Last

Award : ☐

Re-Solicit : ☐

Commodity Group : Services
Vendor : PR Test 1
Alias/DBA :
Response Type : 1
Total Amount : \$1,200.00

Save

Undo

Print

Validate

Submit

Close

- Selecting the **Award** check-box indicates that you would like to create an award for the Vendor selected in the grid section for all Commodity lines in the selected Commodity Group.
- Selecting the **Re-Solicit** check-box indicates that no award will be created for the Commodity Group in question.

If you are awarding Commodity Line(s) to a Vendor you will choose the **Award by Line** section. In the Grid section select a Vendor with which to create an Award. To select a different line for award, click on the link at the bottom of the grid. After making the selection, transition to the **Header**, expand the **Document Creation** section, and generate the Award document.

EV - 758- 0600000007- 1- New- Draft

Action Menu

Award By Line

| | Award | Award Created? | Vendor | Alias/DBA | Resp Type | Award Quantity | Contract Amount | Amount |
|--|-------------------------------------|----------------|-----------|-----------|-----------|----------------|-----------------|--------|
| | <input checked="" type="checkbox"/> | false | PR Test 2 | | Bid | 0.00000 | 2500.00 | \$0.00 |
| | <input type="checkbox"/> | false | PR Test 1 | | Bid | 0.00000 | 1200.00 | \$0.00 |
| | <input type="checkbox"/> | false | DS Test 3 | | Bid | 0.00000 | 3200.00 | \$0.00 |

First Prev Go To Next Last

Group Services: 99052 >

Solicitation Tree

Award : ☐
Re-Solicit : ☐
No Award : ☐
Vendor : PR Test 2
Alias/DBA :
Resp Type : Bid
Amount : \$0.00
Award Quantity : 0.00000
Contract Amount : 2500.00

- Selecting the **Award** check-box indicates that you would like to create an award for the Vendor selected in the grid section for the selected Commodity lines.
- The **Award Quantity** is used to split how many individual units of quantity are being awarded. You may award over the total quantity of the Solicitation line.


Generate the Awards one Vendor at a time from the **Document Creation** section in the **EV** Header. When an award is generated from the **EV** it will take information from several places:

- **Terms and Conditions** and **Supporting Documents** will be copied from the Solicitation.
- Accounting information will be copied from a referencing Requisition (**RQS**), if it exists.
- Pricing will be taken from the Vendor's bid as recorded on the Solicitation Response (**SR/SRW**) document.
- The Vendor will be taken from the Solicitation Response (**SR/SRW**) Document.

NOTE: Award documents with Accounting consequences that reference a Requisition will be generated with a **memo** Commodity and Accounting line reference back to the Requisition.

EV - 758- 0600000007- 1- New- Draft

Action Menu

[Load Responses](#)


General Information

Document Creation

Document Code : PON2

Document Department Code : 758
Document Unit Code : UNIT
Document Prefix :

[Create Document](#)

[Top](#)

Save
Undo
Print
Validate
Submit
Close

- The **Document Code** field allows users to select the target document code that will be created. For **PSC/MOA** please enter **PON2** only. Clicking **Create Document** will create the document for the Vendor and line items selected on **Award by Total**, **Award by Group** or **Award by Line** sections.

NOTE: A single Solicitation line may not be awarded twice to the same Vendor.

NOTE: Only one Award may be created at a time. Every time the **Create Document** link is clicked, the **Award by Total**, **Award by Group** or **Award by Line** sections may only have selections made for a single Vendor.

Inspect the **Awarded Items** section to track how each line was awarded. You may open the Generated documents by clicking on the **Hyperlink Document ID**.

NOTE: If an item is deleted from a generated award it will correspondingly be deleted from this inquiry.

EV - 758- 0600000007- 1- New- Draft

Action Menu

| Line | S0 Commodity Line No | Award Link | Vendor Code | Vendor Name | Alias/DBA | Quantity Awarded | Contract Amount | Discount |
|------|----------------------|---------------------|--------------|-------------|-----------|------------------|-----------------|----------|
| ✓ 1 | 1 | PON2,758,0600000004 | VC0000100001 | PR Test 1 | | 0.00000 | 1200.00 | |

First Prev Go To Next Last

Save

Undo

Print

Validate

Submit

Close

Menu

When the Awards that were generated from the **EV** have been Submitted to Final, you will return to the **EV** document and submit it to final as well. This action will trigger the upload of award information to Vendor Self Service (**VSS**).

How to print the EV document:

Navigate to each section of the document starting at the Header section. Open up each field of the document that you want to view on your printed document. Once you have the fields open, right click on your mouse and select **Print Page**



Exercise 3 – Evaluate and Tabulate Vendor Responses to the RFP using the EV document and Excel document download.

Award a Personal Service Contract from the EV document

Scenario

You need to evaluate and compare the Bids that came in for the **RFP** for Investigation Services you created in Exercise 1 and the Responses you created in Exercise 2. You need to award a **Personal Services Contract (PSC)**.

Task Overview

You will access the **RFP** you created in Exercise 1 from the Document Catalog. You will **Copy Forward** from the **RFP** to an **EV** document. When the **EV** is created you will load in all of the responses. You will inspect and score the Vendor's responses to your **Evaluation Criteria**. You will download the **EV** document into a Bid-Tabulation Spreadsheet. You will record an Award Justification using the **Evaluator Comments** section for the Vendor being awarded the Contract. You will award the **Personal Service Contract (PON2)** from the **EV**. Once the contract has been generated, you will access it from the awarded items inquiry, add additional required information, and **Submit** it to final. Once the award has been submitted to final, you will return to the **EV** document and **Submit** it to final as well.

Procedures

1. Access the **Document Catalog** and open the **RFP** you created in the previous Exercise 1. If you have not logged out since it was created you may open your **History** to find a hyper-link to the document. Click **Home**, Click **Search**, Click **Documents Catalog**, Enter the **Document ID** of the Solicitation from Exercise 1.

2. After opening the document, Click **Copy Forward** from the **RFP** created in Exercise 1 to the **EV** document..

Copy Forward

[Menu](#)

From Document

Category: Doc Dept:

Type: Doc Unit:

Code: ID:

Select Entire Document: ☒ Version:

To Document

Doc. Department Code: Document Id:

Unit Code: Auto Numbering: ☒

| Target Doc Type | Target Doc Code | Description |
|-----------------|-----------------|--------------------------------|
| SR | SR | Respond to Solicitation |
| SO | RFP | Re-Solicit In Same Procurement |
| ✓ EV | EV | Create EV from SO |

First Prev Next Last

3. Click the **EV** line in the grid
4. Enter the following required fields:

| Required Fields | Values |
|----------------------|-----------------------|
| Doc. Department Code | See Student Card |
| Unit Code | UNIT |
| Auto-Numbering | Select the check box. |

5. Click **OK**. An **Evaluation** document (**EV**) is created.

- Click **Load the Responses** to bring all Solicitation Response (**SR**) documents into the Evaluation Document (**EV**). This includes **SRW**, **SR** and Bids submitted through **VSS**.

Welcome, eMARS Student 758

Procurement Accounts Payable Accounts Receivable Budget Cost Accounting

EV 758 0600000008 1

Document View

- ✓ Header
- General Information
- Document Creation
- Load Statistics
- Load Statistics Details
- Awarded Items
- Bid Tabulation
- Evaluators
- Solicitation Commodity Line
- Award By Line
- Award by Group
- Award by Total
- Rank by Criteria Group
- Score by Evaluator
- Score by Criteria
- Comments Summary
- Evaluator Comments
- Document Comments
- Document History
- Document Reference
- Future Triggering

EV - 758- 0600000008- 1- New- Draft

Load Responses

General Information

| | | | |
|---------------------------|-------------------------------------|--------------------------------|------------|
| Solicitation : | RFP | Pricing Attachment Open Date : | |
| Solicitation Dept : | 758 | Pricing Attachment Open Time : | |
| Solicitation Number : | 0600000002 | Created By : | Student758 |
| Procurement Folder : | 34601 | Created On : | 04/12/2006 |
| | PSC | Modified By : | Student758 |
| | Pre-sentence investigation writers | Modified On : | 04/12/2006 |
| Buyer Name : | | | |
| Solicitation Close Date : | 04/12/2006 | | |
| Solicitation Close Time : | 15:00 | | |
| Publish : | <input checked="" type="checkbox"/> | | |
| Publish Date : | | | |
| Document Closed Date : | | | |

Document Creation

NOTE: By selecting the Publish box in the EV document you are consenting to post all received bids from the solicitation to the Vendor Self Service (VSS) website. If you do not want this information to be posted to the public, do not select the Publish box in the Header of the EV document.

- Click **Load Statistics Details** on the Secondary Navigation Panel. Review this section to see all the Vendors who have responded and which bids have been loaded into the **EV**.

Welcome, eMARS Student 758

EV 758 0600000008 1

Document View

- ✓ Header
- Load Statistics
- ✓ Load Statistics Details
- Awarded Items
- Bid Tabulation
- Evaluators
- Solicitation Commodity Line
- Award By Line
- Award by Group
- Award by Total
- Rank by Criteria Group
- Score by Evaluator
- Score by Criteria
- Comments Summary
- Evaluator Comments
- Document Comments
- Document History
- Document Reference
- Future Triggering

EV - 758- 0600000008- 1- New- Draft

| Vendor Name | Alias/DBA | Entered | Response | Loaded for Evaluation | Published |
|---------------------------|-----------|----------|------------|-----------------------|-----------|
| ✓ Bluegrass Investigators | | Manually | 04/12/2006 | | |
| Tactical Investigations | | Manually | 04/12/2006 | | |

First Prev Go To Next Last

Save Undo Print Validate Submit Close

Menu

- Click **Score by Criteria** on the Secondary Navigation Panel. This page allows Buyers to view and score the Vendors' criteria responses directly on the **EV** document by clicking **Load Criteria Line**. An exchangeable grid is used to switch between Vendors. Evaluations that are entered via the **EVT** document will not display on this section.

EV - 758- 0600000008- 1- New- Draft

Load Criteria Line Delete All Lines

| Criteria Code | Description | Vendor | Alias/DBA | Vendor Response | Points Available | Points Awarded |
|---------------|---|-------------------------|-----------|-----------------------------------|------------------|----------------|
| ✓ PRICE | Lowest Bidder Receives Points | Bluegrass Investigators | | see attached pricing | 20 | 20 |
| | Qualifications and Training | Bluegrass Investigators | | Master degree in Criminal Justice | 40 | 40 |
| | Experience Writing Pre-Sentencing Reports | Bluegrass Investigators | | 25 years conducting and | 40 | 40 |

First Prev Go To Next Last

Vendor: Bluegrass Investigators >

Save Undo Print Validate Submit Close

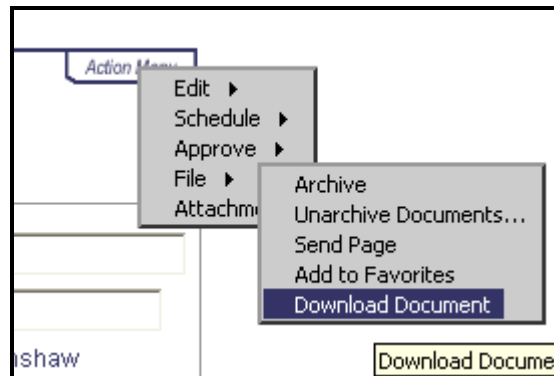
- Click **Load Criteria Line** to load in all of the Vendors' responses to the Evaluation Criteria.

10. Score Vendor Responses to Evaluation Criteria. Use the **Points Awarded** field to establish a score for each Vendor's Evaluation Criteria response. Enter the following scores for each Vendor. To toggle between Vendors and score each Vendors' responses, click the **Vendor:** link below the grid.

| Required Fields | Values |
|-----------------|--|
| Points Awarded | Vendor: Bluegrass Investigators PRICE: 20 QUAL 40 EXP 40 SOW 50 |
| | Vendor: Tactical Investigations PRICE: 15 QUAL 40 EXP 30 SOW 40 |

11. From the **Action Menu**, click on **File>>Download Document** to download all Bids into the MS-EXCEL Bid-Evaluation Template.

NOTE: Excel Macros must be Enabled to generate the Bid-Evaluation Template. Please check the Macro Security before generating the template.



12. To generate the Bid Tabulation spreadsheet, select the **Bid Evaluation** template and click **Generate File**.

Document Templates

[Menu](#)

[Browse](#) [Clear](#)

Document Department :
Target Application :

Template Name :
Max Download Lines :

Template File Name :

| Document Department | Template Name | Template File Name | Target Application | Max Download Lines |
|---------------------|---------------|--------------------|--------------------|--------------------|
| ✓ ALL | BID_EVAL | BIDTAB.xls | MS-EXCEL | 1000 |

[First](#) [Prev](#) [Next](#) [Last](#)

[Generate File](#)
[Back](#)

13. When given the option to **Open** or **Save** the file, click **Open** on the windows dialog box.
14. The MS-EXCEL opens with the data from the Vendor's responses tabulated. Inspect the Bid-Tabulation spreadsheet.
 - a) The **Total Bid** worksheet displays Vendors ranked lowest to highest based on the total cost of their bid. The lowest Vendor will be placed on the left and the highest will be on the right.

| | A | B | C | D | E |
|---|-----------|--|------|---|---|
| 1 | | Bluegrass Investigator Tactical Investigations | | | |
| 2 | Line 1 | 1150 | 1300 | | |
| 3 | Total Bid | 1150 | 1300 | | |
| 4 | | | | | |
| 5 | | | | | |

- b) The **Line Item Group** work sheet consolidates all Vendors responses on a Commodity Group basis. Vendors' Responses to each group will be grouped together and then sorted lowest to highest.

| | A | B | C | D | E |
|---|----------|------------|-------------------------|------------|------------------|
| 2 | Group No | Group Name | Vendor Name | Bid/No Bid | Group Total Cost |
| 3 | 1 | Services | Bluegrass Investigator | Bid | 1150.00 |
| 4 | 1 | Services | Tactical Investigations | Bid | 1300.00 |
| 5 | | | | | |
| 6 | | | | | |

- c) The **Line Item** work sheet consolidates all Vendor Responses on a Commodity line by Commodity line basis. All responses to the same line item are grouped together and then sorted in ascending order (e.g. lowest to highest).

| | A | B | C | F | G | H | I | J | K | L |
|---|--------|----------------|-------------------------|------------------------|---------|---------|------------|-----------------|------------|-----------------|
| | Line # | Line Item Type | Vendor | Line Description | Bid Qty | Bid UOM | Unit Price | Contract Amount | Discount % | Line Item Total |
| 2 | * | | | | | | | | | |
| 4 | 1 | Service | Bluegrass Investigators | PSI Writer District 10 | 0.00000 | | | 1150.00 | | 0.00 |
| 5 | 1 | Service | Tactical Investigations | PSI Writer District 10 | 0.00000 | | | 1500.00 | | 0.00 |
| 6 | | | | | | | | | | |
| 7 | | | | | | | | | | |
| 8 | | | | | | | | | | |
| 9 | | | | | | | | | | |

15. Close MS-Excel and return to the **EV** document.
16. From the **Document Templates** page, click the **Back** link.
17. Click **Evaluator Comments** on the Secondary Navigation Panel. You must record an Award Justification for the Vendor receiving an award on the **Evaluator Comments** section prior to the creation of the award document. If a comment does not exist, you will receive an error message when you attempt to create the award document.

NOTE: When you initially transition to this page the Comments field will not be disabled. (e.g. you will be able to type information in that field. HOWEVER, the text will not be saved unless you have inserted a new line).

EV - 758- 0600000005- 1- New- Draft

Action Menu

Evaluator Comments

| Line | Evaluator | Date | Vendor | Alias/DBA | Comments |
|------|-----------|------------|--------|-----------|----------|
| 0 | | 03/23/2006 | | | |

Insert New Line

Insert Copied Line

First Prev Go To Next Last

Response : PR Test 2 >

Date : 03/23/2006

Comments :

Save

Undo

Print

Validate

Submit

Close

Menu

18. Click **Insert New Line** and enter the following required fields:



| Required Fields | Values |
|-----------------|---|
| Comments | Enter " Recommend Bluegrass Investigators ". |

19. Click **Award by Total** link on the Secondary Navigation Panel.

EV - 758- 0600000008- 1- New- Draft

Action Menu

Award by Total

| | Line | Vendor Name | Alias/DBA | Adjusted Total | Total Points | All Lines Bid? | Response Link |
|---|------|-------------------------|-----------|----------------|--------------|----------------|------------------------------------|
|  | ✓ 1 | Bluegrass Investigators | | | 100 | true | SR,758,06000000009 |
|  | 2 | Tactical Investigations | | | 85 | true | SR,758,06000000008 |

First Prev [Go To](#) Next Last

Minority Owned Enterprise : ☐
Total Bid : \$1,150.00

Women Owned Enterprise : ☐
Factor :

Total Points : 100 Adjusted Total :

All Lines Bid? : ☒
Award All? : ☒

Re-Solicit : ☐

Save

Undo

Print

Validate

Submit

Close

Menu

20. Award all line items to **Bluegrass Investigators** by selecting the **Award All?** check-box.

| Required Fields | Values |
|-----------------|----------------------|
| Award All? | Select the check-box |
| Re-Solicit | Leave blank. |
| All Lines Bid? | Leave checked. |

21. Click **Header** on the Secondary Navigation Panel.

22. Expand the **Document Creation** section to generate the Award Document.

EV - 758- 0600000008- 1- New- Draft

[Action Menu](#)

[Load Responses](#)

▼General Information

Solicitation : RFP

Pricing Attachment Open Date :

Solicitation Dept : 758

Pricing Attachment Open Time :

Solicitation Number : 06000000002

Created By : Student758

Procurement Folder : 34601

Created On : 04/12/2006

PSC

Modified By : Student758

Pre-sentence investigation
writers

Modified On : 04/12/2006

Buyer Name :

Solicitation Close Date : 04/12/2006

Solicitation Close Time : 15:00

Publish : ☒

Publish Date :

Document Closed Date :

▼Document Creation

Document Code : PON2

Document Department Code : 758

Document Unit Code : UNIT

Document Prefix :

[Create Document](#)

[Top](#)

23. Enter the following required fields:

| Required Fields | Values |
|-----------------|----------------|
| Document Code | Select "PON2". |

24. Click **Create Document** to create the Award document for the Vendor and line item(s) selected on **Award by Total**, **Award by Group** or **Award by Line** sections.
25. Click **Awarded Items** on the Secondary Navigation Panel. This view allows you to inspect how each line was awarded. You may open the generated documents by clicking the **Hyperlink Document ID**.

NOTE: If an item is deleted from a generated award it will correspondingly be deleted from this Inquiry.

Welcome, eMARS Student 758

Procurement Accounts Payable Accounts Receivable Budget Cost Accounting

EV 758 0600000008 1

Document View

- Header
 - Load Statistics
 - Load Statistics Details
- Awarded Items
 - Bid Tabulation
 - Evaluators
 - Solicitation Commodity Line
 - Award By Line
 - Award by Group
 - Award by Total
 - Rank by Criteria Group
 - Score by Evaluator
 - Score by Criteria
 - Comments Summary
 - Evaluator Comments
- Document Comments
- Document History
- Document Reference
- Future Triggering

EV - 758- 0600000008- 1- New- Draft

Action Menu

| Line | SO Commodity Line No | Award Link | Vendor Code | Vendor Name | Alias/DBA | Quantity Awarded | Contract Amount | Discount |
|------|----------------------|---------------------|--------------|-------------------------|-----------|------------------|-----------------|----------|
| ✓ 1 | 1 | PON2,758,0600000006 | VC0000100079 | Bluegrass Investigators | | 0.00000 | 1150.00 | |

First Prev Go To Next Last

Menu

Save Undo Print Validate Submit Close




Please wait before going on with the exercise.


26. Click the **Award Link** to open the **PON2** document just created. The **PON2** document opens to the **Header** section.







Action Menu

[Load T and C Ship/Bill To Lines](#)
[Assemble Document](#) [View Assembly Request](#)

Header


General Information

Document Name :
Record Date : 
Budget FY :
Fiscal Year :
Period :
Document Description :

PCard ID : 
PCard Exp :
Procurement Folder : 35601
Procurement Type : PSC
Procurement Type ID : 
Cited Authority : 
Personal Services Contracts-Standard
Accounting Profile : 
Terms Template : 
Confirmation Order : ☐
Default Form : 
Last Print Date :

Actual Amount : \$1,150.00
Closed Amount : \$0.00
Closed Date :

Total of Header Attachments : 1
Total of All Attachments : 2

27. Click **Edit** at the bottom of the page to add required information to the **PON2**.
28. In the General Information section of the **Header**, enter the following required fields:

| Required Fields | Values |
|----------------------------|--|
| Procurement Type ID | Select "17" from the pick list. |
| Cited Authority | Select FAP 111-43-00-STD from the pick list. |
| Default Form | Enter: PO_CNTRCT_FORM (If processing a modification, choose the MOD_CNTRCT_FROM). |

29. Open the **Contact** section and note that the information defaulted from the **EV** document.
30. Click on **Vendor** in the Secondary Navigation Panel and note the vendor information defaulted from the **EV** document.
31. Click on **Terms and Conditions** in the Secondary Navigation Panel and note the **Free Form Terms and Conditions** that defaulted from the **EV** document. When the Free Form Terms and Conditions defaults from the Solicitation the attachment associated is the same attachment used in the solicitation document. You will need to delete this attachment and upload your own attachment to be incorporated into your final contract. Users will need to download a copy of the Personal

Service Contract Terms Template from the eMARS website and modify it to appropriately reflect the PON2.

32. Navigate to the **eMARS website** and click on the **Procurement Functional Area**.

eMARS - enhanced Management Administrative Reporting System

eMARS Newsletter Issue 16 now available...[Click here for more](#)

| Applications | Training | Functional Areas |
|---|--|--|
| <ul style="list-style-type: none"> eMARS (Financial Production) <p>FY 2007 Year-End</p> <ul style="list-style-type: none"> Year-End Information (links related to year-end documentation such as allotment listings; pending transactions in eMARS; procedures, guidelines, communications, etc.) (07/18/07) Fiscal Year 2008 Monthly Closing Schedule (07/27/07) <p>Communication</p> | <ul style="list-style-type: none"> eMARS End-User Training (Training resources e.g. Catalog, ISGs, Materials, Manuals, Registration, Schedule) (10/04/07) update <p>Support Orgs</p> <ul style="list-style-type: none"> Controller's Office Commonwealth Office of Technology Customer Resource Center Office of Material and Procurement Services Statewide Accounting Services | <ul style="list-style-type: none"> Cost Accounting (08/23/06) Chart of Accounts (COA) Plan (08/08/06) Financial (08/03/06) Fixed Assets (10/02/07) update Interfaces (08/01/06) Procurement (i.e. Personal Service Templates) (10/05/07) update Reporting (08/15/07) Vendor Self Service (VSS) Security/Workflow Approvals (05/19/06) |

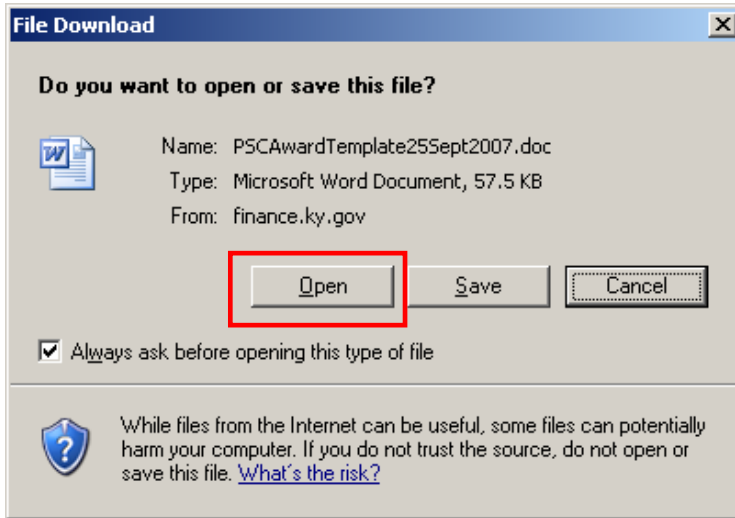
33. Select the **Professional Service Contracts** template and **Open** a copy of the template to your desktop.

Procurement

Terms and Conditions Templates

The following templates have been created by the Office of Procurement Services to replace the PSC1 Terms and Conditions.

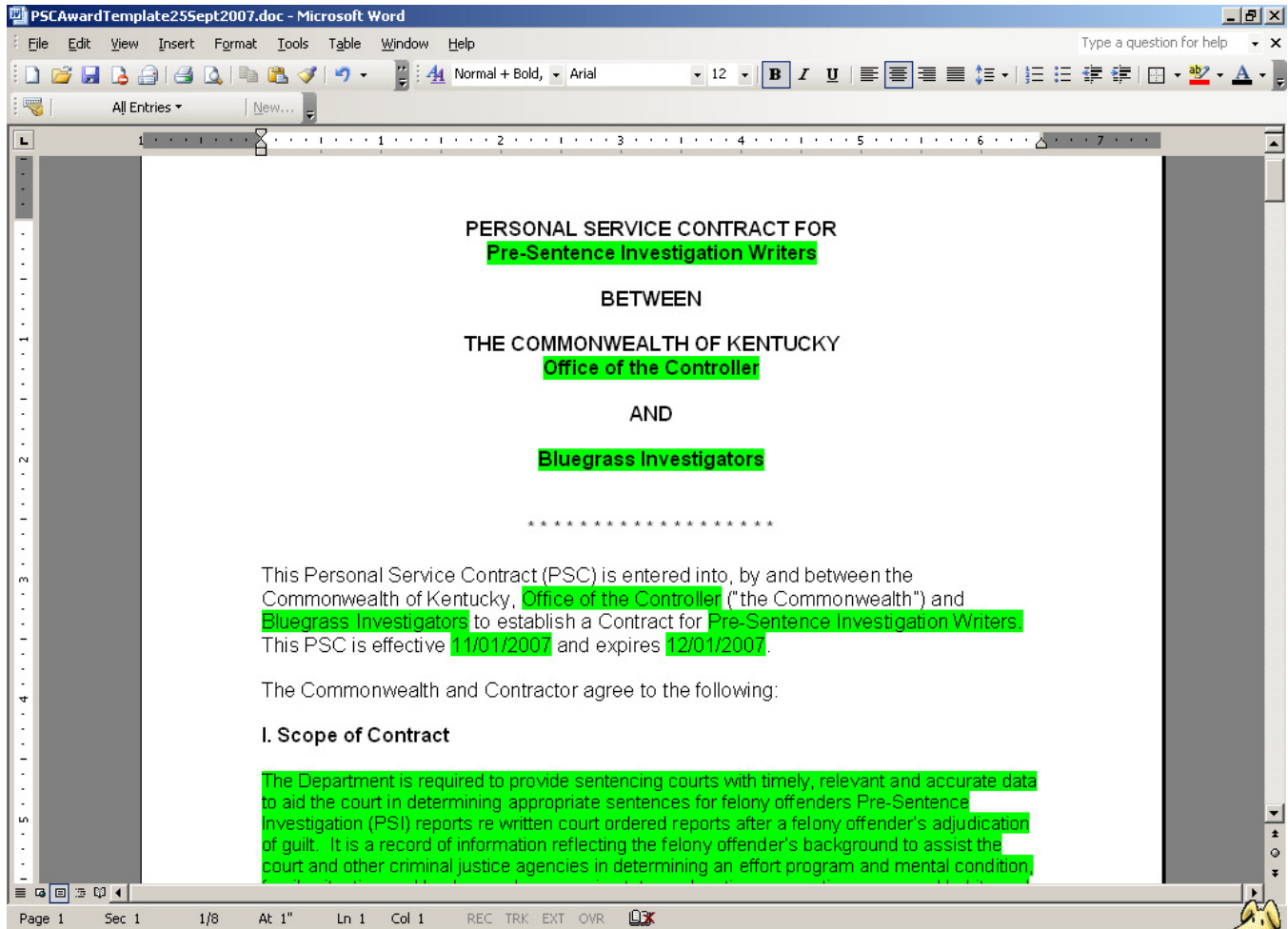
- ~~Professional Services (RFP)~~ (10/06/08) **update**
- Personal Service Contracts (PSC)** (10/06/08) **update**



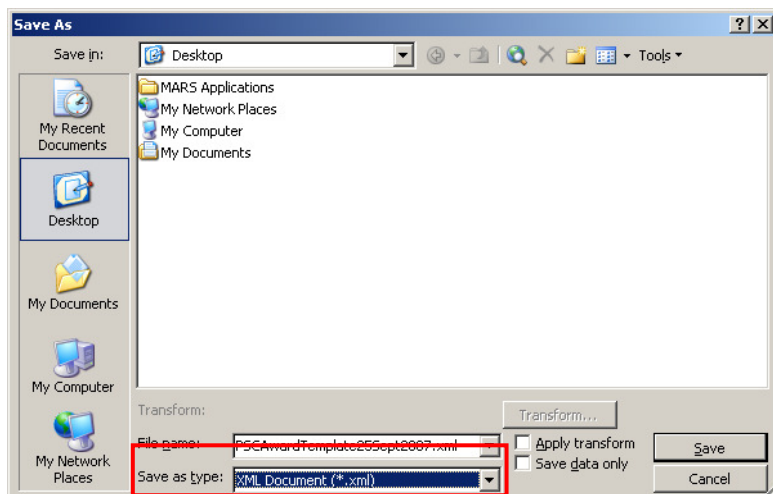
34. Modify only the highlighted sections of the document to make it specific to the Personal Service Contract and the issued Request for Proposal.

Enter the following into the appropriate fields:

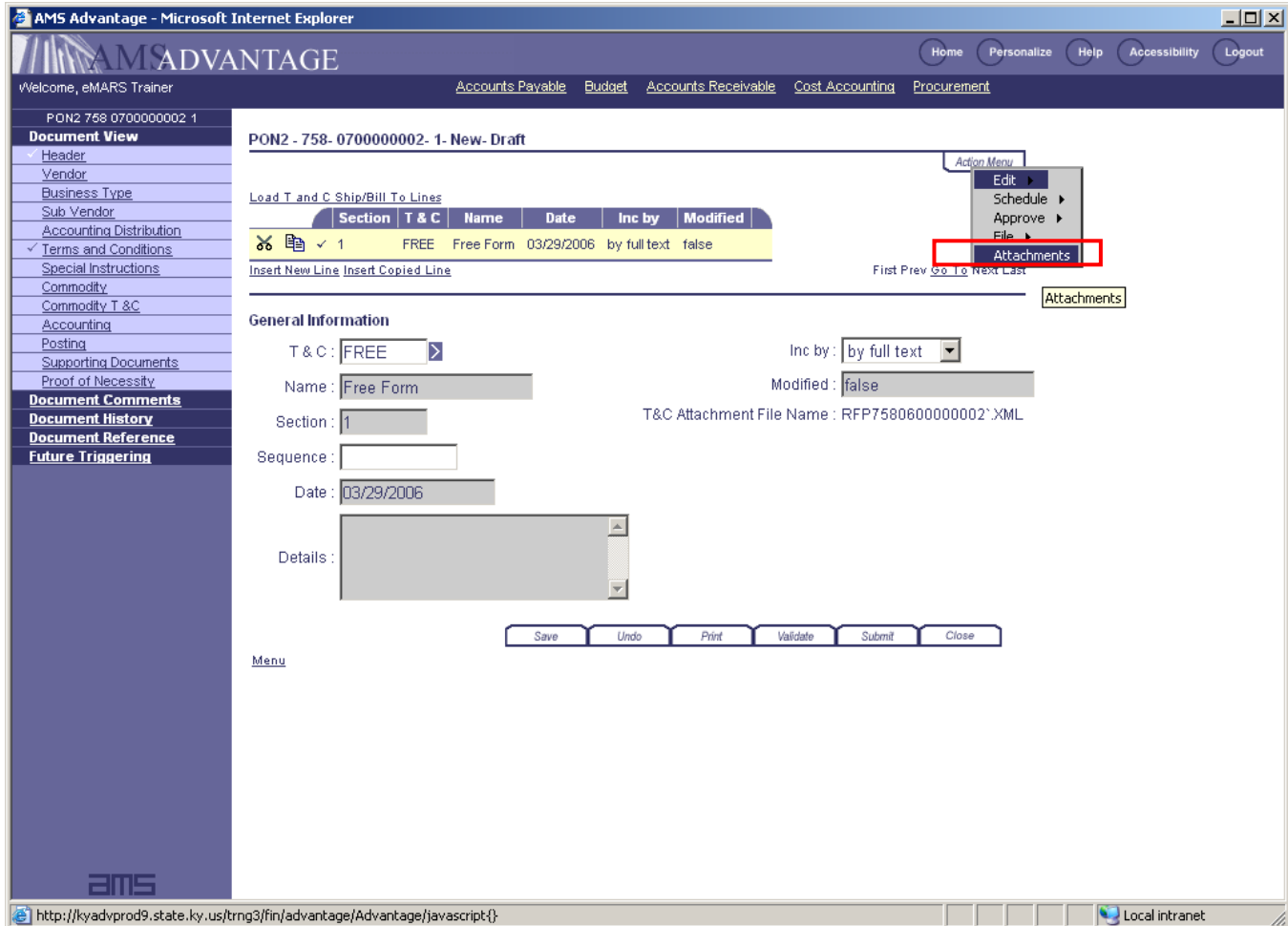
| Required Fields | Values |
|--------------------------|--|
| RFP Title | Enter: "Pre-Sentence Investigation Writers" |
| Agency | Enter: "Office of the Controller" |
| Vendor | Enter: "Bluegrass Investigators" |
| Scope of Contract | Enter: "The Department is required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offender's....." |



35. Remove all highlighting from the document by selecting all the text (Ctrl + A) and select the highlight from the toolbar.
36. Once all the changes have been made to the document save it to your desktop as an **.XML**. and close the file.



37. Return to the **Terms and Conditions** section of your **PON2** document.
38. Click the **Attachments** link from the **Action Menu**.



AMS Advantage - Microsoft Internet Explorer

Welcome, eMARS Trainer

Accounts Payable Budget Accounts Receivable Cost Accounting Procurement

PON2 758 0700000002 1

Document View

- Header
- Vendor
- Business Type
- Sub Vendor
- Accounting Distribution
- ✓ Terms and Conditions
- Special Instructions
- Commodity
- Commodity T & C
- Accounting
- Posting
- Supporting Documents
- Proof of Necessity
- Document Comments
- Document History
- Document Reference
- Future Triggering

PON2 - 758- 0700000002- 1- New- Draft

Load T and C Ship/Bill To Lines

| Section | T & C | Name | Date | Inc by | Modified |
|---------|-------|-----------|------------|--------------|----------|
| 1 | FREE | Free Form | 03/29/2006 | by full text | false |

Insert New Line Insert Copied Line

First Prev Go To Next Last

Action Menu

- Edit
- Schedule
- Approve
- File
- Attachments**

Attachments

General Information

T & C: FREE Inc by: by full text

Name: Free Form Modified: false

Section: 1 T&C Attachment File Name: RFP7580600000002.XML

Sequence: Date: 03/29/2006

Details:

Save Undo Print Validate Submit Close

Menu

http://kyadvprod9.state.ky.us/trng3/fin/advantage/Advantage/javascript/ Local intranet

39. The **Attachment** page opens. Click **Delete** to discard the *Terms and Conditions* associated with the *Request for Proposal* document. Once the attachment has been deleted, click **Upload** to attach your *Personal Service Contract Template* you modified in step 36.

NOTE: It is important that you delete the default attachment that is automatically brought in when the Free Form T & C is selected. If the default is not deleted it may cause problems during the assembly process.

Attachments [Menu](#)

| File Name | Type | Date | User ID | Primary State |
|------------------------|--------------|---------|-----------|---------------|
| ✓ RFP7580600000002.xml | Document XML | 11/1/07 | Student00 | New |

First Prev Next Last

[Upload](#)
[Download](#)
[Delete](#)
[Restore](#)

File Name : RFP7580600000002.xml
 Type : 4
 Date : 11/1/07
 User ID : Student00
 Primary State : 0

[Return to Document](#)
[View Attachment History](#)

40. **Browse** your local hard drive for the PON2 Awards template that has been saved as an **.XML** document.

NOTE: Make sure that the Attachment Type of Document XML is selected

Upload Attachment [Menu](#)

[Upload](#)
[Cancel](#)

Attachment File : Browse...

Description :

Attachment Type : Document XML ▼

41. Once you have located and selected the correct file, click **Upload**.

Upload Attachment [Menu](#)

[Upload](#)
[Cancel](#)

Attachment File : Browse...

Description :

Attachment Type : Document XML ▼

42. Once the upload has completed successfully, click on the **Return to Document** link to be transitioned back to the Terms and Conditions section of the PON2. Once there you will notice that the T & C Attachment File name has changed to your new file.

Attachments [Menu](#)

| File Name | Type | Date | User ID | Primary State |
|----------------------------------|--------------|---------|-----------|---------------|
| ✓ PSCAwardTemplate25Sept2007.xml | Document XML | 11/1/07 | Student00 | New |

First Prev Next Last

[Upload](#)
[Download](#)
[Delete](#)
[Restore](#)

File Name : PSCAwardTemplate25Sept2007.xml
 Type : 4
 Date : 11/1/07
 User ID : Student00
 Primary State : 0

Description :

[Return to Document](#)
[View Attachment History](#)

PON2 - 758- 0700000002- 1- New- Draft [Action Menu](#)

[Load T and C Ship/Bill To Lines](#)

| Section | T & C | Name | Date | Inc by | Modified |
|---------|-------|----------------|------------|--------------|----------|
| ✂ | ✓ 1 | FREE Free Form | 03/29/2006 | by full text | false |

[Insert New Line](#)
[Insert Copied Line](#)
First Prev [Go To](#) Next Last

General Information

T & C : [Details](#)
 Name :
 Section :
 Sequence :
 Date :
 Details :

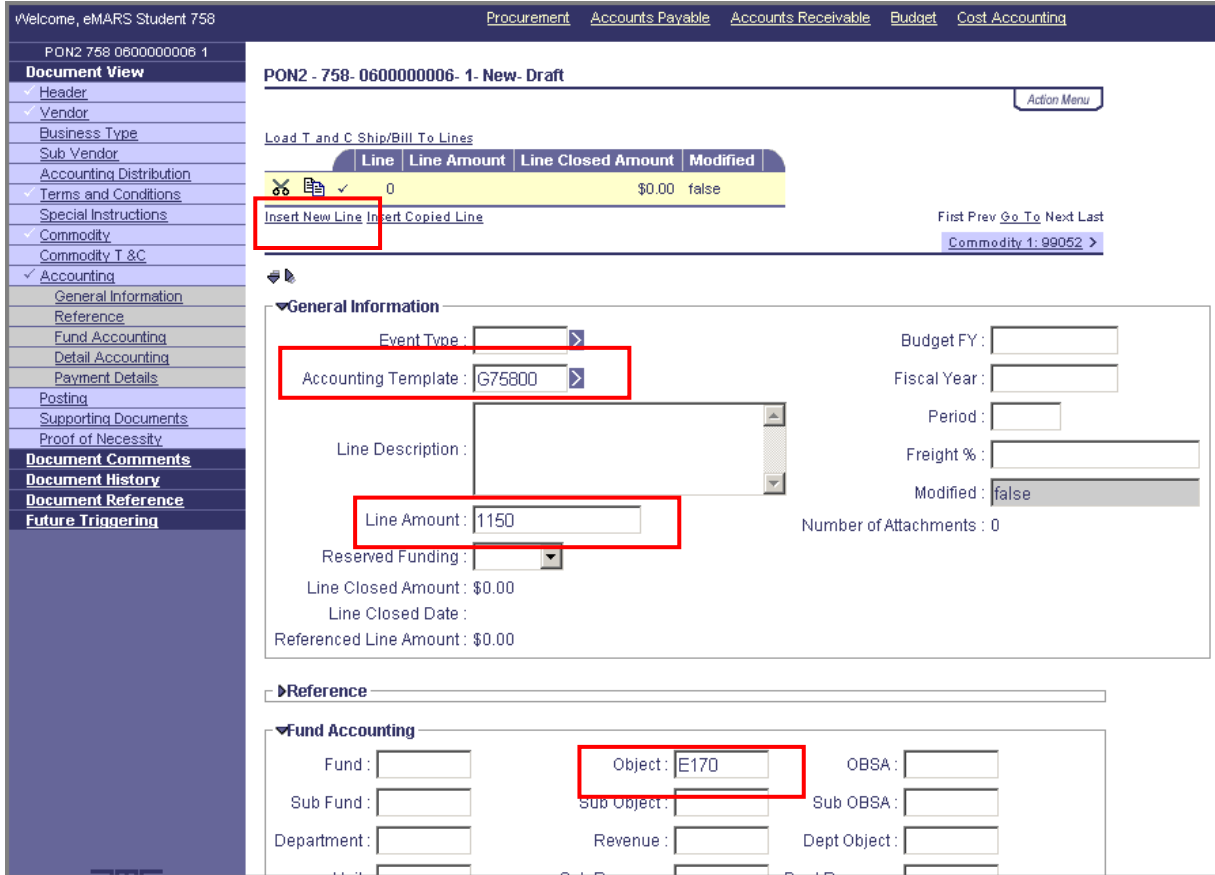
Inc by :
 Modified :

T&C Attachment File Name : PSCAWARDETEMPLATE25SEPT2007.XML

[Menu](#)

43. Click on **Commodity** in the Secondary Navigation Panel and note the Commodity information defaulted from the **RFP** document. (This information should not be changes due to the Competitive Bidding Processes.)

44. Click on **Accounting** in the Secondary Navigation Panel to enter Accounting string information.



Welcome, eMARS Student 758

Procurement Accounts Payable Accounts Receivable Budget Cost Accounting

PON2 758 0600000006 1

Document View

- Header
- Vendor
- Business Type
- Sub Vendor
- Accounting Distribution
- Terms and Conditions
- Special Instructions
- Commodity
- Commodity T & C
- Accounting
- General Information
- Reference
- Fund Accounting
- Detail Accounting
- Payment Details
- Posting
- Supporting Documents
- Proof of Necessity
- Document Comments
- Document History
- Document Reference
- Future Triggering

PON2 - 758-0600000006-1-New-Draft

Action Menu

Load T and C Ship/Bill To Lines

| Line | Line Amount | Line Closed Amount | Modified |
|------|-------------|--------------------|----------|
| 0 | | \$0.00 | false |

Insert New Line Insert Copied Line

First Prev Go To Next Last

Commodity 1: 99052

General Information

Event Type: []

Budget FY: []

Accounting Template: G75800

Fiscal Year: []

Period: []

Line Description: []

Freight %: []

Line Amount: 1150

Modified: false

Number of Attachments: 0

Reserved Funding: []

Line Closed Amount: \$0.00

Line Closed Date: []

Referenced Line Amount: \$0.00

Reference

Fund Accounting

Fund: []

Object: E170

OBSA: []

Sub Fund: []

Sub Object: []

Sub OBSA: []

Department: []

Revenue: []

Dept Object: []

45. Click **Insert New Line** and enter the following required information:

| Required Fields | Values |
|---------------------|--|
| Accounting Template | Enter the Accounting Template from your Student Card. |
| Line Amount | Enter the contract amount. Enter 1150 . |
| Object | Enter E170 . |

46. Complete the **Proof of Necessity** component. Click **Proof of Necessity** from the Secondary Navigation Panel. The page opens to the **General Information** section.

▼General Information

Type of Award :

New

Description of Work to be Performed :

To provide Pre-Sentence Investigation (PSI) reports on an as needed basis for Probation and Parole District 11.

Planned Performance Monitoring Activities :

The Department of Corrections, Probation and Parolee (or its designees) shall monitor progress of job tasks and make payments to

47. In the **General Information** section, enter the following required fields:

Note: You are not required to enter in all the information noted in the field below.

| Required Fields | Values |
|---|---|
| Type of Award | Select "New" |
| Description of Work to be Performed | Enter "To provide Pre-Sentence Investigation (PSI) reports on an as needed basis for Probation and Parole District 10. The Division of Probation and Parole are required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders. Pre-sentence investigation (PSI) reports are written court ordered reports after a felony offender's adjudication of guilt. It is a record of information reflecting the felony offender's background to assist the court and other criminal justice agencies in determining an effective program for the offender including an analysis of the history of delinquency or criminality, physical and mental condition, family situation and background, economic status, education, occupation, personal habits and any other matters that the court directs to be included." |
| Planned Performance Monitoring Activities | Enter "The Department of Corrections, Probation and Parole (or its designees) shall monitor progress of job tasks and make payments to the vendor in accordance with the terms detailed in the contract clauses. Upon completion, pre-sentence investigation reports shall be maintained solely in the custody of the Department of Corrections, Division of Probation and Parole. Vendor shall be required to maintain confidentiality of report contents in compliance with KRS 439.510 and KRS 532.050." |

48. Open the **Source of Funds** section and enter the following required fields:

▼Source of Funds

Total Amount on Contract : \$1,150.00
If federal, is there an associated grant : ☐

Federal : \$0.00

General : \$1150

Agency : \$0.00

Capital Construction : \$0.00

Other : \$0.00

| Required Fields | Values |
|-----------------|------------|
| General | Enter 1150 |

49. Open the **Contract Cost Information** and enter the following required fields:

| ▼Contract Cost Information | |
|---|---|
| Method of Payment : | External |
| Frequency of Payment : | Monthly |
| Agency Paying FICA : | No |
| Award cost included as a line item in the most recent budget bill for the Commonwealth : | No |
| If the award cost is not included as a line item in the most recent budget bill for the Commonwealth, is the cost included in the current agency budget : | No |
| Detailed Description of Projected Cost : | \$150/per report. Cost is based on estimated projection of pre-sentence investigation reports per month. |
| Basis for Payment : | |
| If Other, explain : | It has been determined that the composition of PSI reports was taking a significant amount of time away from the Probation and Parole officers. This contract will free up valuable time. Funding shall be generated by the economies of scale this contract will create. In as much as this contract represents less than one-tenth of one percent of the total Probation and Parole budget, the agency can absorb any added cost this contract shall precipitate. |

| Required Fields | Values |
|---|---|
| Frequency of Payment | Select Monthly . |
| Agency Paying FICA | Select No . |
| Agency cost included as a line item in the most recent budget bill for the Commonwealth | Select No . |
| If award cost is not included as a line item and not included in the current agency budget, explain the source of the funds | Enter “It has been determined that the composition of PSI reports was taking a significant amount of time away from the Probation and Parole officers. This contract will free up valuable time. Funding shall be generated by the economies of scale this contract will create. In as much as this contract represents less than one-tenth of one percent of the total Probation and Parole budget, the agency can absorb any added cost this contract shall precipitate.” <u>NOTE: You are not required in this exercise to enter in all the information above.</u> |
| Detailed Description of Projected Cost | Enter “\$150/per report. Cost is based on estimated projection of pre-sentence investigation reports per month.” |

50. Open the **Justification** section and enter the following required fields.

▼Justification

Work could or should be performed by state personnel :

No

Name / Address of Other Providers Considered :

Tactical Investigations
Bowling Green, KY

Basis for Selection (PSC)/ Reason for Exchange (MOA) :

An RFP was placed on the Commonwealth's Web-site. The vendor met all qualifications of the criteria in the RFP and was

Justification for Outside Provider :

In the three most urban Probation and Parole districts, there are specialized units of officers that write PSI's (pre sentence

Note: You are not required to enter in all the information noted in the field below.

| Required Fields | Values |
|--|--|
| Work could or should be performed by state personnel | Select No . |
| Name / Address of Other Providers Considered | Enter "Tactical Investigations, Bowling Green, KY" . |
| Basis for Selection (PSC)/Reason for exchange (MOA) | Enter "An RFP was placed on the Commonwealth's Web-site. The vendor met all qualifications of the criteria in the RFP and was awarded the contract." |
| Justification for Outside Provider | Enter "In the three most urban Probation and Parole districts, there are specialized units of officers that write PSI's (pre sentence investigation) exclusively. In an effort to benefit from this practice in the rural districts, the Department of Corrections will enter into personal service contracts with individuals to write PSI's, thus freeing the officers to focus on critical offender issues and expand the workforce without adding additional full-time personnel. The Department of Corrections will be better able to fulfill its mission and obligations to the citizens of the Commonwealth in protecting life and property". <u>NOTE: You are not required in this exercise to enter in all the information above.</u> |

51. Open the **Contact Information** and enter the following required fields.

▼Contact Information

Name :

Phone Number :

| Required Fields | Values |
|-----------------|--------------------|
| Name | Enter “your name” |
| Phone Number | Enter 502-564-9641 |

Print the PON section of the document. The Proof of Necessity section of the PON2 document is specifically reserved for the Government Contract Review Committee and will not print out with the assembled form of the document.

52.

53. Click **Validate**. Review and correct any errors.

To Assemble:

1. From the Header Section click on **Assemble Document**.
2. Click **Submit Assemble Request**.
3. Click on **Refresh**. You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
4. Click **Back** to return to the document.

To Print the Assembled Form:

- 1 Return to **Header**.
- 2 From the **Action Menu**, select **Attachments**.
- 3 Click **Download**.
- 4 While the **PDF** document is open use the File Menu Options to either print or email the document.

54. **Submit** the document to initiate workflow for approval.

NOTE: In production, the **PON2** will be submitted to initiate workflow for approval.

NOTE: Before closing the **PON2** document, write down the Document ID on your Student Card. You will need it for the next exercise.

55. Once the **PON2** Award has been submitted to final, click **Close** to return to the **EV** document.

56. Click **Submit** to complete the **EV** document. This action will trigger the upload of award information to Vendor Self-Service (**VSS**).



This page intentionally blank.

7 – Proof of Necessity Agreement Document

PON2 documents will be reviewed by the Finance and Administration Cabinet to ensure that the user department follows all policy, procedures and statutes that govern Personal Service Contracts. Finance will also review the **PON2** to ensure that the proper **Procurement Type**, **Cited Authority** and **Terms and Conditions** are used.

NOTE: The **PON2** should be used for all Personal Service Contracts and Memorandum of Agreement.

PON2 document may be created in one of two ways:

- a) From the **EV** document as a result of a Competitive Negotiation process, and
- b) For Sole Source scenarios the **PON2** may be created from your **Procurement Workspace**.

PON2 Document

Access the **Procurement Workspace**.

Click **Create Stand Alone Document**, select **Create Stand Alone Awards**, and click **Personal Service Contract (PON2)**.

Click **Create** to change into Create mode.

Enter your document **Department Code** and **Unit Code** from your Student Card.

Click **Auto Numbering**.

Click **Create** to create the **PON2** document. The document opens to the **Header** page.

Complete the required and optional information in the Header section.



- The **Document Description** is required and does print-out. The description is also searchable from various inquiries like the Procurement Document Inquiry (**PRCUDOC**).
- You may select an **Accounting Profile** here to populate the **Accounting Distribution** section. Once you have selected an **Accounting Profile**, click on the **Load Accounting Profile** link to populate the Accounting Distribution section with the Accounting lines associated with the profile.
- Select a **Procurement Type ID** that corresponds to the business process being followed.

- The **Cited Authority** represents the authority which enables a user to enter the specific document for the amount specified on the document. This list is pre-filtered by your selection in the **Procurement Type** field.
- The **Default Form** field is used to select the out-put form to be used in the document assembly and printing process.

111 of 169

Complete the **Contact** section:

Contact

Issuer ID : mshaw

Matt Shaw
502-573-6806
matt.shaw@ky.gov

Team ID :

Buyer : mshaw
Matt Shaw
502-573-6806
matt.shaw@ky.gov

Requestor ID : mshaw

Name : Matt Shaw

Phone Number : 502-573-6806

Email : matt.shaw@ky.gov

- The **Issuer ID** field will default to your information. If your are completing the document on someone else's behalf then pick their record from the pick-list by clicking on the **arrow** next to the **Issuer ID** field.
- Complete the **Requestor ID** field that is used to identify for whom the goods or services are being requested, (e.g. who will actually be using the items or services detailed on this Requisition). Pick their record from the Requestor pick-list by clicking on the **arrow** next to the **Requestor ID** field.

Complete the **Extended Description** Field (optional).

Extended Description

Extended Description :

The Department of Corrections, Division of Probation and Parole, is required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders. Pre sentence investigation (PSI) reports are written court ordered reports after a felony offender's adjudication of guilt. It is a record of

- The **Extended Description** field can be used to further describe the nature of the requirements being requested. This field can store up to 1500 characters of text. This field does not print.

Complete the **Default Shipping/Billing** section. If the same Shipping and Billing information should be used on each line of the Purchase Order you can complete this section. When you are creating Commodity line items you may click on the **Ship/Bill To Lines** to have this information automatically populated on the line item. (Optional) Shipping Information is not required on the **PON2** document.

Default Shipping/Billing

Shipping Location : 111480

Billing Location : 111964

FT. CAMPBELL BOULEVARD
225961
551 DEPT OF VOCATIONAL REHAB
FT. CAMPBELL BOULEVARD
HOPKINSVILLE
KY
42240
US

1427 CAMPBELLSBURG ROAD HWY 421
NORTH
328295
CFC CBS
1427 CAMPBELLSBURG ROAD HWY 421
NORTH
NEW CASTLE
KY
40050
US

Shipping Method :

Free On Board :

Delivery Date :

Delivery Type :

Billing Additional Info :

Shipping Additional Info :

- The **Shipping Location** field is used to identify where the goods requested on the Requisition should be delivered. To select a **Shipping Location** click on the **arrow** next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location** reference table.
- The **Billing Location** field is used to identify where the Vendor's Invoice should be mailed. Click on the **arrow** next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location** reference table.
- The **Delivery Date** field is used to enter the date by which you will need the goods being requested to be delivered.

NOTE: Do not complete the **Shipping Method**, **Free on Board**, **Shipping additional information**, **Billing Additional Information** and **Delivery Type** fields. These fields are not required. These fields do not print-out.

Complete the **Vendor** component.

PON2 - 758- 0600000004- 1- New- Draft
Action Menu

Load T and C Ship/Bill To Lines

| Vendor Line | Vendor Customer | Legal Name | Line Amount | Modified |
|-------------|-----------------|------------|-------------|----------|
| 1 | VC0000100001 | PR Test 1 | \$1,200.00 | false |

First Prev [Go To](#) Next Last

Vendor

Vendor Customer : VC0000100001

Legal Name : PR Test 1

Alias/DBA :

Address Code : AD001

100 Test Lane

Frankfort

KY

40601

US

Web Address http:// :

Vendor Preference Level : 99

Vendor Contact ID : PC001

Vendor Contact Name : Julie Doane

Vendor Contact Phone : 502564-9641

Vendor Contact Phone Ext. :

Vendor Contact Email : julie.doane@ky.gov

Secondary Reason :

Modified : false

Discount

- The **Vendor Customer** code field is used to store the eMARS Vendor Code for the Vendor being recorded. Click on the **arrow** next to the **Vendor Customer** field to open the **Vendor Customer** pick list. On the pick-list page you may search for a Vendor by Legal Name, Last Name, Alias, and/or Vendor Active Status.

NOTE: If you know part of the Vendor Code field you may type it into the **Vendor Customer** field using wildcards. When you click on the **arrow**, the Vendor pick-list will be filtered by the value you have entered.

NOTE: The **Vendor Address** and **Contact Information** will default to this document when it is validated.

NOTE: If this document was generated from an Evaluation (EV) document then the Vendor Component will be pre-populated.

Build **Commodity** Lines. The **Commodity** section of the Contract is used to list all distinct goods or services being requested.

Complete the required fields for the Commodity **General Information** section.

Load T and C Ship/Bill To Lines

| Line | CL Description | Line Amount | Modified |
|------|------------------------|-------------|----------|
| 1 | PSI Writer District 10 | \$1,200.00 | false |

Insert New Line Insert Copied Line

First Prev Go To Next Last

Vendor 1: VC0000100001 >

Load T and C Ship/Bill From Header
Recalculate Accounting Line Amount

General Information

CL Description: PSI Writer District 10

Warehouse: >

Commodity: 99052 >

Stock Item Suffix: >

Investigative Services

Supplier Part Number: >

Line Type: Service

Quantity: 0.00000

Unit: >

Unit Price: \$0.00

Discounted Unit Price: \$0.00

List Price: \$0.00

Contract Amount: \$1,200.00

Service From: 04/19/2006

Service To: 04/30/2007

T & C Template: >

Fixed Asset: ☐

Lock Order Specs: ☐

Lock Catalog List Price: >

Vendor Preference Level: 99

Commodity Specs:

Extended Description: The Department of Corrections, Division of Probation and Parole required to provide sentencing courts with timely, relevant and

Non-Reserved Funding Open Amount Total: \$1,200.00

Item Sub Total: \$1,200.00

Tax Amount: \$0.00

Line Amount: \$1,200.00

Closed Amount: \$0.00

Closed Quantity: 0.00000

Closed Contract Amt: \$0.00

- The **CL Description** field should be used to record a brief description of the good or service being requested. This field does print-out on all documents and is used on subsequent Procurement Documents. This field is displayed in the grid area of the Commodity section in order to help you identify which line you would like to inspect or modify.
- The **Commodity** field is used to store the five digit NIGP Commodity code that closest matches the item or service being purchased. This field is used primarily for classification purposes.

NOTE: It is important to make the first commodity the one that is most relevant to the Contract as a whole. The first commodity code is used by EMARS to determine which office will receive the **PON2** for processing.

- The **Line Type** field is used to select how the cost of the line item will be established. Generally speaking, goods should be recorded with a **Quantity**, **Unit of Measure** and **Unit Price** and services should be entered as **Contract Amount**. When the Vendor for the **PON2** is a state employee and salary payments are issued to them from **UPPS**, a **Line Type** of **Service** should be selected. This will ensure that only a lump-sum dollar value may be entered.
 - When you know the **Unit Price** a **Line Type** of “**Item**” should be selected. The **Unit** of Measure, **Unit Price**, and **Quantity** are required.
 - If the unit cost is unknown or not applicable the lump sum cost of the line should be recorded in the **Contract Amount** field. In this case a Line Type of “**Service**” should be selected. When the Line Type is service then the **Service From** and **Service To** dates are required. These dates are the effective dates for resultant award document.
- The **Extended Description** field should be used to provide a detailed description of the desired item. Up to 4000 characters of information can be stored in this field. To access a larger field in which to type the extended description click on the **More Text** link.

NOTE: When a **PON2** document is created through the **EV** document the Extended Description will contain the same information that was entered into the **RFP** document. The text that defaulted when the **PON2** is created must be modified to reflect the **PON2** document.

NOTE: To insert a **TAB** into the **Extended Description** field the user must type **[Ctrl]+[Tab]**.

Extended Description :

The Department of Corrections, Division of Probation and Parole, is required to provide sentencing courts with timely, relevant and

More Text

Commodity Extended Description

Menu

[Save](#)
[Cancel](#)
[Return to Line Item](#)

Vendor Line Number : 1 Commodity Line Item: 1

The Department of Corrections, Division of Probation and Parole, is required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders. Pre sentence investigation (PSI) reports are written court ordered reports after a felony offender's adjudication of guilt. It is a record of information reflecting the felony offender's background to assist the court and other criminal justice agencies in determining an effort program for the offender including an analysis of the history of delinquency or criminality, physical and mental condition, family situation and background, economic status, education, occupation, personal habits and any other matters that the court directs to be included.

The Probation and Parole District Supervisor assigns PSI reports on an as needed basis. The PSI report must be delivered to the sentencing court two days prior to sentencing. Normal time allotted for the completion of a PSI report three weeks. The PSI writer may be called upon to attend court proceeding if ordered by the judge.

- Accounting Profile (Optional)** field can be used to select an Accounting profile. When the Accounting Profile field is populated on the **Header** and document is validated, the Accounting section associated with the Commodity line is automatically populated with the Accounting Templates and related percentages associated with the Accounting Profile.

Complete the **Shipping/ Billing** information section.

- The **Shipping Location** field is used to identify where the goods requested on the Requisition should be delivered. Click on the arrow next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location** reference table. The **Shipping Location** code is not required on the **PON2** document.
- The **Billing Location** field is used to identify where the Vendor's Invoice should be mailed. Click on the arrow next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location** reference table.

Complete the **Specifications** section (Optional). This section may be used to record additional information that you feel should be stored separately from the Commodity Line extended description.

Complete the **Terms and Conditions** component. Terms and Conditions are created by attaching a Word Document, saved as **.XML** to the Terms and Conditions section of the Proof of Necessity document. The Office of Procurement Services (**OPS**) has developed a Terms and Conditions template for all Personal Service Contract documents. This template is located on the eMARS and the Office of Procurement Services websites. The template contains the required information that must be incorporated in the Terms and Conditions section and allows for users to make changes to areas of the template to be agency specific.

Users will need to download a copy of the Personal Service Contract Award template from the website and modify only the highlighted portions of the template to make it specific to the agency. Once the changes have been made to the template the document will need to be saved as **.XML** and uploaded as a **Free Form** Attachment to the Terms and Conditions section of the document.

Please follow these steps to add your **Terms and Conditions**

- Navigate to the *Procurement Functional* area of the eMARS website and **Open** a copy of the desired template that will need to be modified to your desktop.

eMARS - enhanced Management Administrative Reporting System

eMARS Newsletter Issue 16 now available...[Click here for more](#)

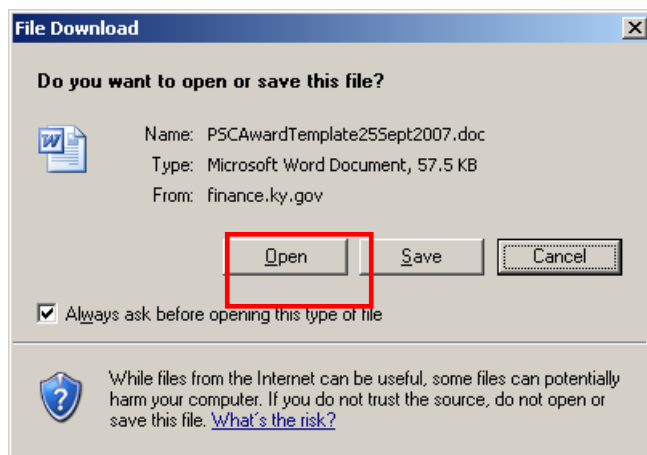
| Applications | Training | Functional Areas |
|---|--|--|
| <ul style="list-style-type: none"> eMARS (Financial Production) <p>FY 2007 Year-End</p> <ul style="list-style-type: none"> Year-End Information (links related to year-end documentation such as allotment listings; pending transactions in eMARS; procedures, guidelines, communications, etc.) (07/18/07) Fiscal Year 2008 Monthly Closing Schedule (07/27/07) <p>Communication</p> | <ul style="list-style-type: none"> eMARS End-User Training (Training resources e.g. Catalog, ISGs, Materials, Manuals, Registration, Schedule) (10/04/07) update <p>Support Orgs</p> <ul style="list-style-type: none"> Controller's Office Commonwealth Office of Technology Customer Resource Center Office of Material and Procurement Services Statewide Accounting Services | <ul style="list-style-type: none"> Cost Accounting (08/23/06) Chart of Accounts (COA) Plan (08/08/06) Financial (08/03/06) Fixed Assets (10/02/07) update Interfaces (08/01/06) Procurement (i.e. Personal Service Templates) (10/05/07) update Reporting (08/18/07) Vendor Self Service (VSS) Security/Workflow Approvals (05/19/06) |

Procurement

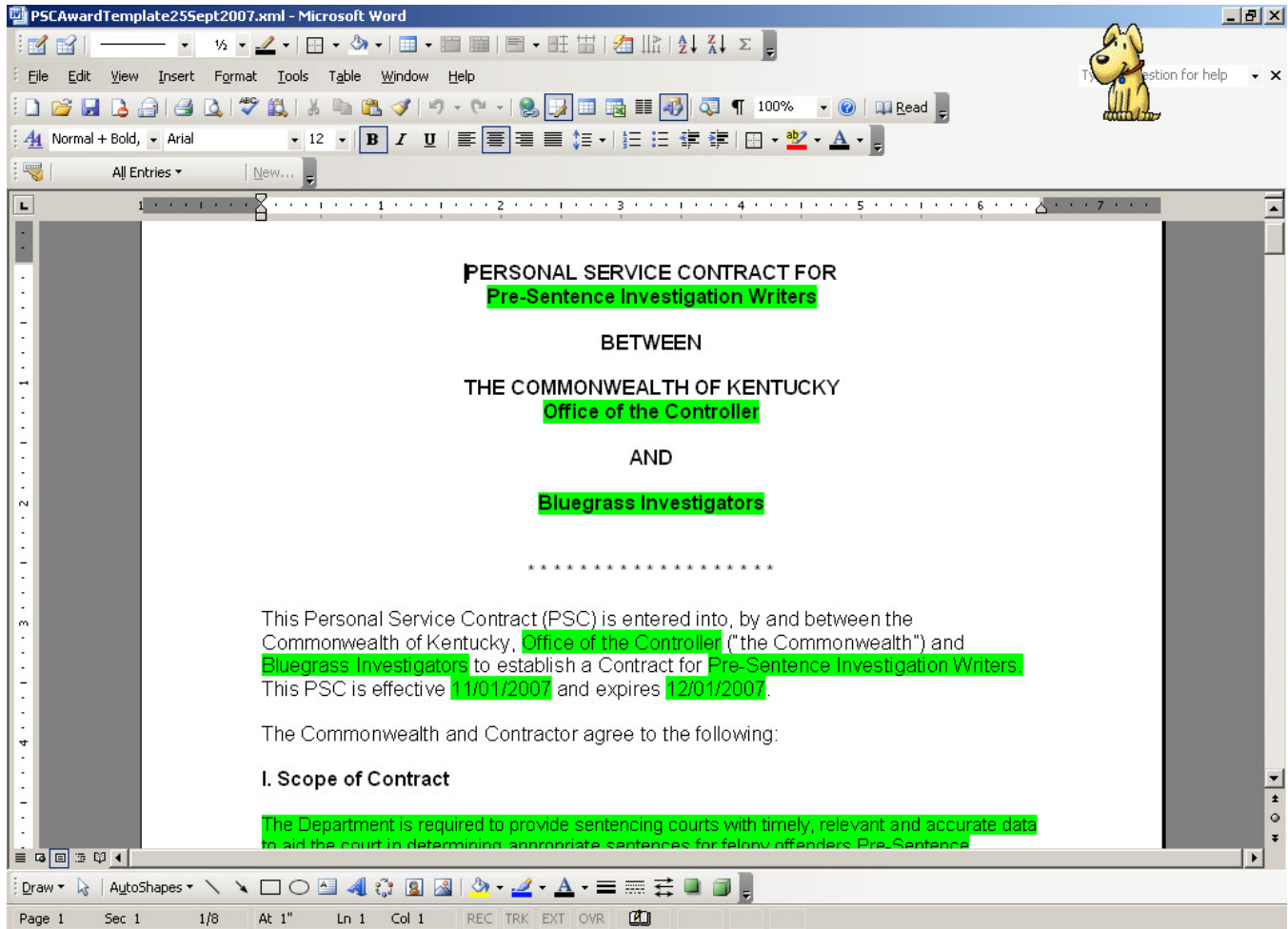
Terms and Conditions Templates

The following templates have been created by the Office of Procurement Services to replace the PSC1 Terms and Conditions.

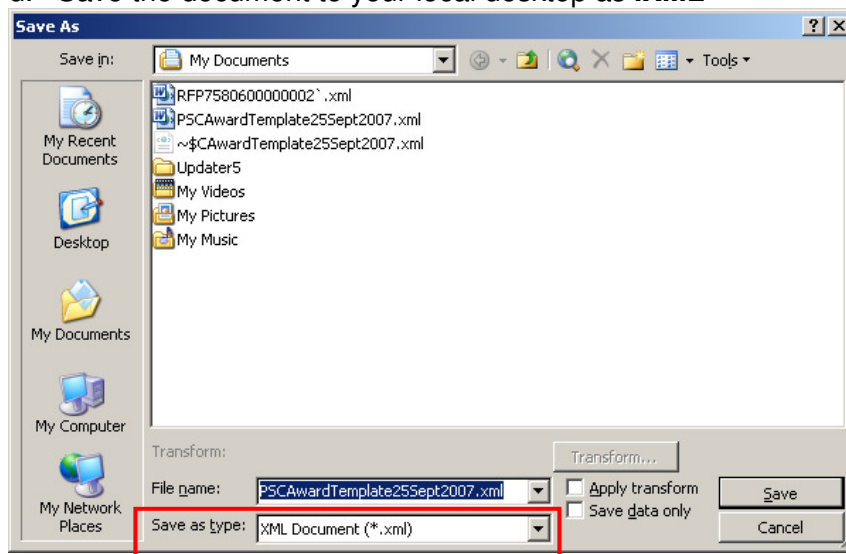
- ~~Professional Services (RFP)~~ (10/06/08) **update**
- Personal Service Contracts (PSC)** (10/06/08) **update**



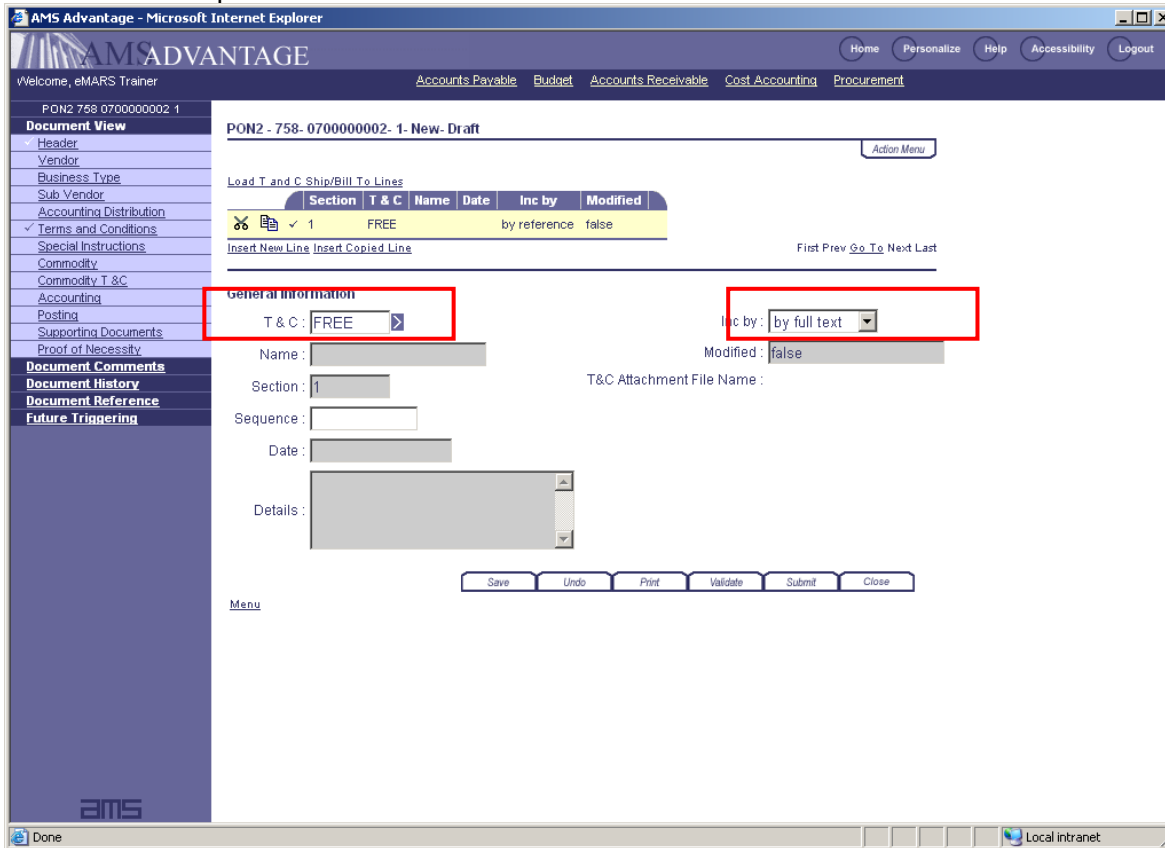
- Modify only the highlighted sections of the document to make it specific to the agency and the Personal Service Contract.



- c. Remove all highlighting from the template
- d. Save the document to your local desktop as .XML



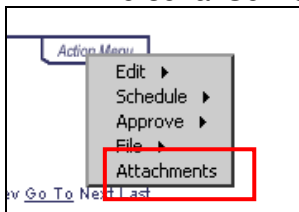
- e. Navigate to the **Terms and Conditions** section of the **PON2** and click **Insert New Line**. When the record has been added, click on the **arrow** next to the T & C field and select **Free Form** from the picklist.



- f. Using the drop down menu change the Inc by: to **Full Text**.

NOTE: By selecting the Free Form Terms and Conditions, the system allows you to attach your own **.XML** document to your **Proof of Necessity** document rather than a system standard. When the Free Form template is used a blank document will be incorporated into the Attachments section of the PON2 Terms and Conditions.

- g. Click the **Attachments** link from the **Action Menu**. This will allow you to attach the copy of the Personal Service Contract Award Template that you created.



- h. The **Attachment** page opens. Click **Delete** to discard the blank document brought in when the Free Form Terms and Conditions was selected from the T & C picklist. Once the Free Form attachment has been deleted click **Upload** to attach your template.

NOTE: It is important that you delete the default attachment that is automatically brought in when the Free Form T & C is selected. If the default is not deleted it may cause problems during the assembly process.

Attachments

[Menu](#)

| File Name | Type | Date | User ID | Primary State |
|-----------------|--------------|---------|-----------|---------------|
| ✓ Free Form.xml | Document XML | 11/1/07 | Student00 | New |

First Prev Next Last

[Upload](#)
[Download](#)
[Delete](#)
[Restore](#)

File Name : Free Form.xml
 Type : 4
 Date : 11/1/07
 User ID : Student00
 Primary State : 0

[Return to Document](#)
[View Attachment History](#)

- i. Once on the **Upload** page click **Browse** to search your local hard drive for your Award template that was previously created.

Upload Attachment

[Menu](#)

[Upload](#)
[Cancel](#)

Attachment File : [Browse...](#)

Description :

Attachment Type :

- j. Once you have located and selected the file, click **Upload** to incorporate the document into your **PON2**.

Upload Attachment

[Menu](#)

[Upload](#) [Cancel](#)

Attachment File : [Browse...](#)

Description :

Attachment Type :

- k. Once the upload has completed successfully, click **Return to Document** to be transitioned back to the **Terms and Conditions** section of the **PON2**. Once there you will notice that the *T & C Attachment File Name* has changed to your new file. eMARS will not use this file for the final version of the contract.

AMS Advantage - Microsoft Internet Explorer

AMS ADVANTAGE

Welcome, eMARS Trainer

[Accounts Payable](#) [Budget](#) [Accounts Receivable](#) [Cost Accounting](#) [Procurement](#)

PON2 758 0700000002 1

Document View

- Header
- Vendor
- Business Type
- Sub Vendor
- Accounting Distribution
- Terms and Conditions
- Special Instructions
- Commodity
- Commodity T & C
- Accounting
- Posting
- Supporting Documents
- Proof of Necessity
- Document Comments
- Document History
- Document Reference
- Future Triggering

PON2 - 758- 0700000002- 1- New- Draft

[Action Menu](#)

Load T and C Ship/Bill To Lines

| Section | T & C | Name | Date | Inc by | Modified |
|---------|-------|-----------|------------|--------------|----------|
| 1 | FREE | Free Form | 03/29/2006 | by full text | false |

[Insert New Line](#) [Insert Copied Line](#)

First Prev Go To Next Last

General Information

T & C : Inc by :

Name : Modified :

Section :

Sequence :

Date :

Details :

[Save](#) [Undo](#) [Print](#) [Validate](#) [Submit](#) [Close](#)

[Menu](#)

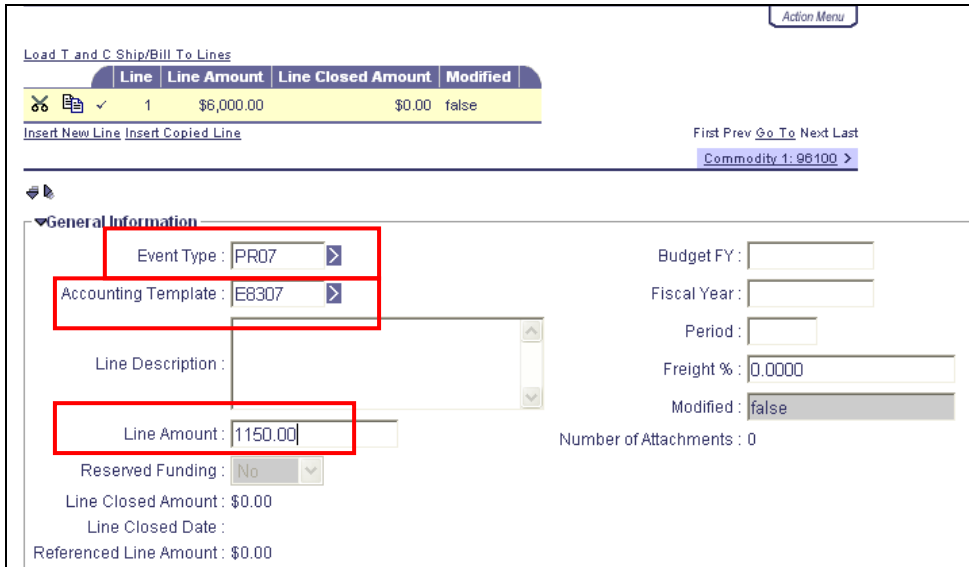
AMS

Done Local intranet

Complete the Accounting Section

The Accounting Section Panel will need to be manually completed if a template or profile is incomplete or has not been used. The Panel displays all Accounting lines referencing the parent Commodity line. Each Commodity line will require an Accounting line.

Complete the required fields for the Accounting General Information section:



The **Event Type** is used to determine what posting codes will be used while bringing in specific rules from data entry concerning referenced transactions, customer codes, vendor codes and all defined chart of account elements in the system. The **DO** document uses the following Event Types:

Encumbering Event Types:

- **PR05**- Order from External Vendor (default)
- **PR06**- Order from Internal vendor

Non-Encumbering Event Types:

- **PR07**- Non-Accounting Order

Select the **Accounting Template** by selecting the pick list next to the field. Accounting Templates are used to populate the Fund and Detail Accounting elements in the document. Elements of the Accounting Template are inferred after the document is validated. Any values entered by the end user either before or after the template has been inferred will override any values from the template.

Indicate the **Sub Total Line Amount**. This is the amount that is allocated to this Accounting Line. The sum of all Accounting Lines must equal the referenced Commodity Line.

View the Fund and Detail Accounting elements. These elements will be inferred if an Accounting Template is used or may be added by the user.

Complete the **Proof of Necessity Component (PON)**. Owned by the Legislative Review Committee (LRC) and required on all Personal Service Contracts pursuant to **KRS 45A.695(2)**. The **PON**

component is designed to capture information necessary for **LRC** to produce their monthly agenda. The **PON** tab contains fields that require certain information as outlined below: If the document does not meet all of the above requirements, an electronic “sticky note” is applied to the contract with an explanation and is routed back to the requesting agency. Agency will review and make correction/s and return to Finance for further processing. If the document passes all of the requirements above, the Personal Service Contract office applies an electronic approval (Finance Validate) and routes the document to Finance/Legal.

- The need for the service;
- The unavailability of state personnel or the non-feasibility of utilizing state personnel to perform the service;
- The total projected cost of the contract of agreement and source of funding;
- The total projected duration of the contract;
- Payment information in detail;
- In the case of memorandum of agreement or similar device, the reason for exchanging resources or responsibility; and
- Such other information as the committee deems appropriate.

General Information Section

View All (1 of 1) : Document validated successfully

PON2 - 758- 0600000004- 1- New- Draft

[Load T and C Ship/Bill To Lines](#)

[Select Line](#)

First Prev [Go To](#) Next Last

General Information

Type of Award :

Description of Work to be Performed :

Planned Performance Monitoring Activities :

- To complete the **Type of Award** field select **New** if this is the original contract for the service. Select **Renew** if you are extending the service dates for an additional period. Select **Amendment** if you are modifying the contract within the existing service dates.
- Prepare a complete, yet concise **Description of Work to be Performed**. Please ensure correct spelling and grammar. Include: Description of project; types(s) of service to be delivered; reports or products to be prepared; reason for duration of contact; etc.).

- Describe the **Planned Performance Monitoring Activities**. Provide the name, title, office, location and telephone number of the responsible person that will be monitoring the activities. Describe the monitoring activities, both programmatic and fiscal, which will be performed including the manner in which monitoring needs will be addressed in the contract to facilitate this activity.

Source of Funds section

Source of Funds

Total Amount on Contract : \$1,200.00

If federal, is there an associated grant :

Federal : \$0.00

General : \$1,200.00

Agency : \$0.00

Capital Construction : \$0.00

Other : \$0.00

- General**- Amount of 0100 Fund monies.
- Federal**- Amount of 1200 Fund monies.
- Agency**- Amount of 1300 Fund monies.
- Capital Construction**- Amount of CPTL Fund monies
- Other**- Amount of 1400 Fund or Proprietary Fund monies.
- If federal, is there an associated grant.** Answer yes if paid with 1200 fund monies and is associated with a federal grant.

Contract Cost Information

| Contract Cost Information | |
|---|---|
| Method of Payment : | External |
| Frequency of Payment : | Monthly |
| Agency Paying FICA : | No |
| Award cost included as a line item in the most recent budget bill for the Commonwealth : | No |
| If the award cost is not included as a line item in the most recent budget bill for the Commonwealth, is the cost included in the current agency budget : | No |
| Detailed Description of Projected Cost : | \$150/per report. Cost is based on estimated projection of pre-sentence investigation reports per month. |
| Basis for Payment : | |
| If Other, explain : | |
| If award cost is not included as a line item and not included in the current agency budget, explain the source of the funds : | It has been determined that the composition of PSI reports was taking a significant amount of time away from the Probation and Parole |

- For the **Frequency of Payment** select the payment frequency to which the vendor has agreed. If Other, explain provide an explanation if "Other" was selected as the Frequency of Payment
- **Award cost included as a line item in the most recent budget bill for the Commonwealth** Answer yes if this contract cost is included as a line item in the current budget bill. If answer is no, answer the agency budget question.
- **If the award cost is not included as a line item in the most recent budget bill for the Commonwealth, is the cost included in the current agency budget.** Answer yes if this contract cost is not included as a line item in the current budget bill but is included in the current agency budget. If answer is no, explain the source of funds in the space provided.
- **If award cost is not included as a line item and not included in the current agency budget, explain the source of the funds.** Explain the source of funds if this contract cost is not a line item in the current budget bill and is not included in the current agency budget.
- **Detailed Description of Projected Cost**
- **Basis of Payment**
 - Hourly: \$_____ per hour,
 - Per Diem: \$_____ per day,
 - Fee for Service: \$_____ per service, or explain other basis for payment.

Justification

▼Justification

Work could or should be performed by state personnel : No

Name / Address of Other Providers Considered :

Basis for Selection (PSC)/ Reason for Exchange (MOA) :

No other providers responded.

No other providers responded. An RFP was placed on the Commonwealth's Web-site. The vendor met all qualifications of the

Justification for Outside Provider :

In the three most urban Probation and Parole districts, there are specialized units of officers that write PSI's (pre sentence

- **Work could or should be performed by state personnel.** If answer is no, Justification for Outside Provider must be supplied.
- **Name / Address of Other Providers Considered** List the name and address of all other providers that were considered for this service.
- **Basis for Selection /Reason for Change** Explain process used in making decision, e.g., solicitation of proposals, bids, references, and evaluation criteria applied.

- **Justification for Outside Provider** The following questions should be addressed at a minimum:
 - What in-house method(s) were considered and why were potential in-house method(s) rejected?
 - Is the part of such nature that: it should be done independently of the agency to avoid a conflict of interest; it requires unique or special expertise/qualifications; and/or legal or other special circumstances require use of an outside provider?
 - If services are needed on a continuing basis, describe efforts made to secure services through regular state employment channels?
 - Will agency personnel provide staff support services to the contractor?

Contact Information

▼Contact Information

Name : Kathryn Robinette

Phone Number : 888-123-4321

- Enter the **Name** of the agency contact who can answer questions regarding the terms and conditions of this contract.
- Record the **Phone Number** of the agency contact who can answer questions regarding the terms and conditions of this contract.

NOTE: If this document was generated from an Evaluation document then the **Vendor** section will be pre-populated.

Validate your document

To Assemble:

1. From the Header Section click on **Assemble Document**
2. Click **Submit Assemble Request**
3. Click on **Refresh**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
4. Click **Back** to return to the document

To Print the Assembled Form:

1. Return to **Header**
2. From the **Action Menu**, select **Attachments**.
3. Click **Download**.
4. While the **PDF** document is open use the File Menu Options to either print or email the document.

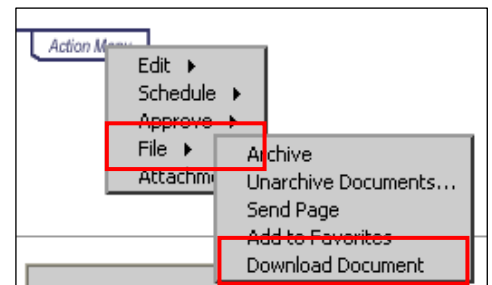
Submit the **PON2** to initiate workflow for approval.

Identify who should be evaluating the **PON2**. Users who will be evaluating the Personal Service Contract should be set up on the Vendor Performance Evaluation (PEEVALR) table.

Printing the Proof of Necessity (PON) section of the PON2 document.

The Proof of Necessity (PON) section of the document is used by the Government Contract Review Committee and will not be incorporated into the assembled version of the Personal Service Contract. However, the PON section of the document can be printed and kept for office records. The printed PON section is created from a file generated from the Action Menu of the PON2. Follow the bellow steps to print the Proof of Necessity section. (Security Macros have to be enabled in order to view the PON document properly).

Open the Action Menu, and select File Download Document



Click Generate File to create the PON printout.

Document Templates

Menu

Browse
Clear

Document Department :
Target Application :

Template Name :
Max Download Lines :

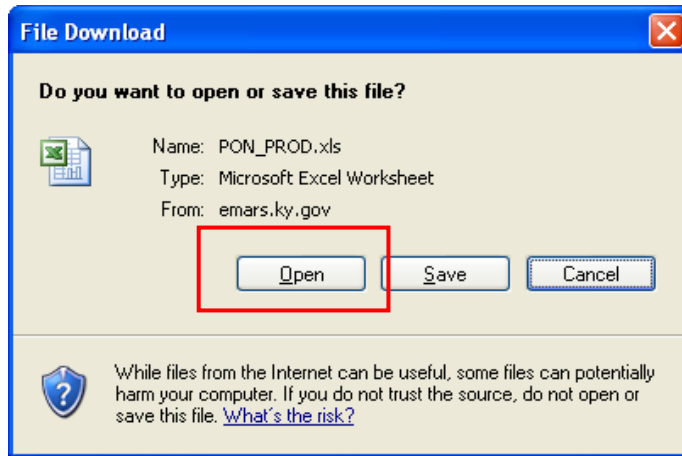
Template File Name :

| Document Department | Template Name | Template File Name | Target Application | Max Download Lines |
|---------------------|---------------|--------------------|--------------------|--------------------|
| ✓ ALL | PON Printout | PON_PROD.xls | MS-Excel | 200 |

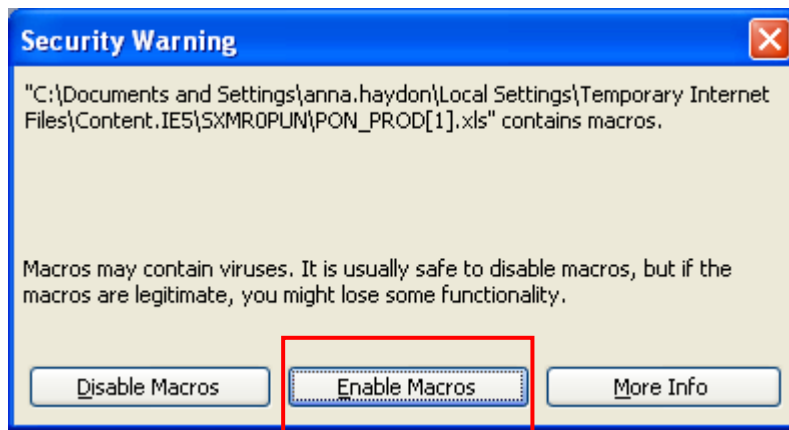
First Prev Next Last

Generate File
Back

Open the spreadsheet generated from the document templates page.



At the security warning prompt, select Enable Macros



View/Print/Save the PON Printout for office records.

| | A | B | C | D | E | F | G | H | I | J |
|---|--|--------------------------|---|---|---|---|---|--------------|---------------------|---|
| 1 | LEGISLATIVE RESEARCH COMMISSION | | | | | | | Contract: | PON2-758-0600002171 | |
| 2 | PROOF OF NECESSITY FORM | | | | | | | Solicitation | -- | |
| 3 | Dept Code | Office Of The Controller | | | | | | Folder ID | | |
| 4 | * Type of Award | New | | | | | | | | |
| 5 | | | | | | | | | | |
| 6 | 1 Name and Address of Vendor: | | | | | | | | | |
| 7 | | COMMUNITY ACTION COUNCIL | | | | | | | | |
| 8 | | | | | | | | | | |

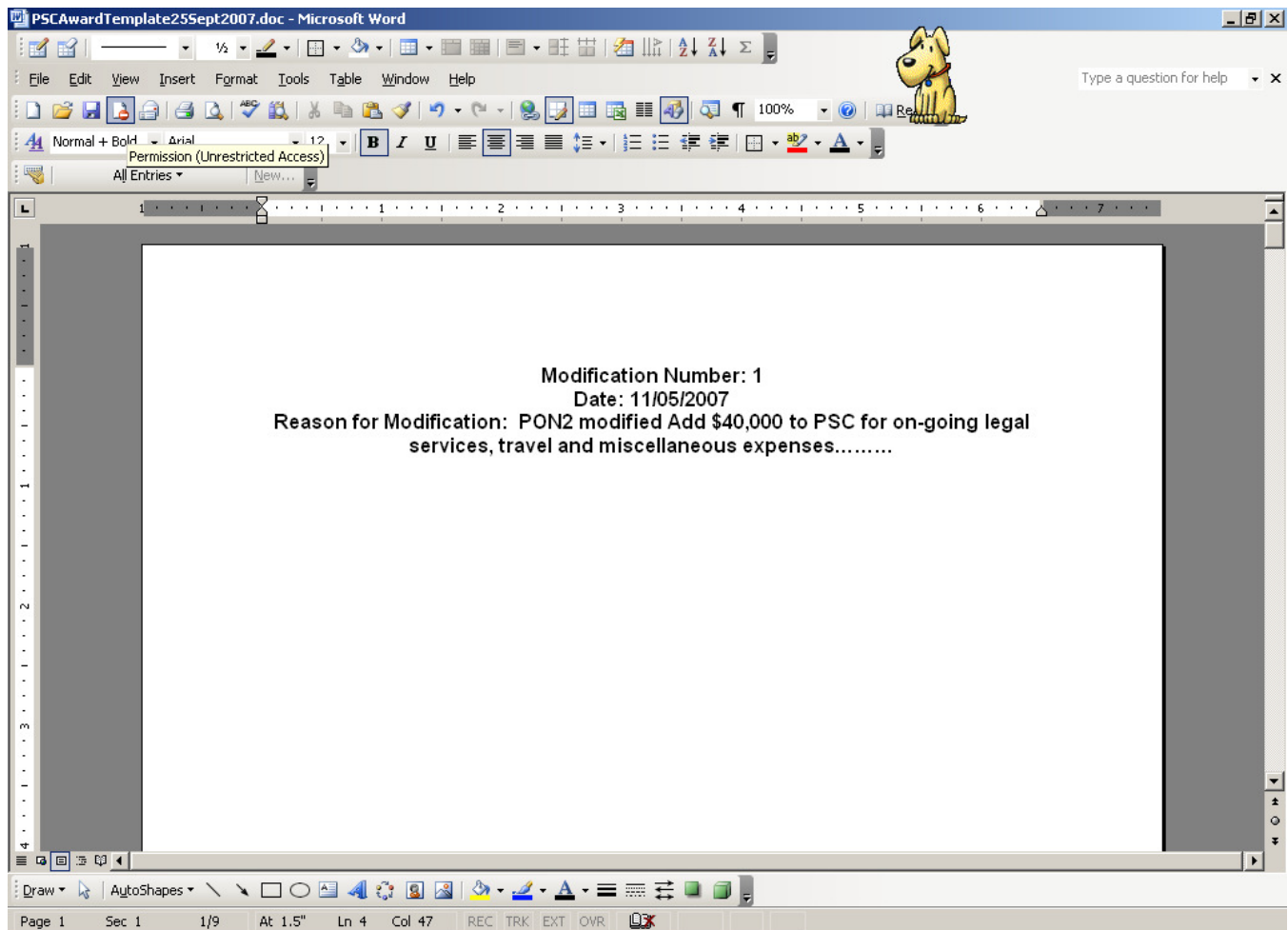
Note: The PON Print out is for office records only. It should not be uploaded as an attachment to the PON2 document itself.

Modifying your PON2

When modifications need to be completed on the PON2, it is important to document what changes are being made and where. The correct section of the PON2 document to identify the changes will be the Terms and Conditions section of the document. The Office of Procurement Services (OPS) is asking that you add a page to the beginning of the Terms and Conditions attachment identifying the Date, *Modification Number* and the *Reason for the Modification*. Once these changes have been added to the Terms and Conditions document it will need to be Saved to your desktop and Uploaded in the Terms and Conditions section through the Action Menu. The pervious attachment will need to be Deleted and the new attachment with the Reason for Modification will need to be added in its place.

Prior to users assembling their documents, select a *Default Form* in the *Header* of the contract. The *Default Form* helps determine what form your assembled document should be formatted. It is important when you select a default form in the *Header* of the document, that you select the same form when you assemble the document. For example, when modifying your *PON2* document, you choose the modification default form. During the assembly, you must also choose the modification form prior to submitting the *Assemble Request*.

Default Form : **PO_CNTRCT_MOD_FORI**



PSCAwardTemplate25Sept2007.doc - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Normal + Bold Arial 12 Permission (Unrestricted Access)

All Entries New...

Modification Number: 1
Date: 11/05/2007
Reason for Modification: PON2 modified Add \$40,000 to PSC for on-going legal services, travel and miscellaneous expenses.....

Page 1 Sec 1 1/9 At 1.5" Ln 4 Col 47 REC TRK EXT OVR

8 - Processing Personal Service Contract/Memorandum of Agreement Exempt from the GCRC review on the PO2.

The **PO2** is the decentralized award document to be used by departments to establish Personal Service Contracts, Memorandum of Agreement, or Federal Grants exempt from review by the Government Contract Review Committee or for Non-Professional Service Contracts.

From an application perspective the **PO** document is largely identical to the **PON2** document. There are, however, two key differences:

1. On **PON2** documents the Proof of Necessity component must be completed.
2. On **PON2** documents payment is initiated by performing the copy forward action to a Payment Request (**PRC**) document. Whereas, a **PO2** document is paid through the automated payment matching process. For **PO2s** the user must process an **IN** document (Vendor Invoice)

Purchase Order two way match Document

Access the **Procurement Workspace**. Click **Create Stand Alone Document**, select **Create Stand Alone Awards**, and click **Contract 3 Way Match (PO)**.

Click **Create** to change into Create mode.

Enter the document **Department Code** and **Unit Code** from the Student Card.

Click **Auto Numbering**.

Click **Create** to create the **PO2** document. The document opens to the **Header** page.

Complete the required and optional information in the **Header** section:

PO2 - 758-0600000013- 1- New- Draft

Action Menu

[Load T and C Ship/Bill To Lines](#)
[Load Accounting Profile](#)
[Assemble Document](#) [View Assembly Request](#)

Header

General Information

Document Name :
Record Date :
Budget FY :
Fiscal Year :
Period :
Document Description : Curb Replacement- City of Lawrenceburg
Actual Amount : \$8,400.00
Closed Amount : \$0.00
Closed Date :

PCard ID :
PCard Exp :
Procurement Folder :
Procurement Type : MOA/PSC Exception or Exemption
Procurement Type ID : 14
Cited Authority : KRS 177.280
Agreements of local government units :
Accounting Profile :
Terms Template :
Confirmation Order : ☐
Default Form :
Last Print Date :

Total of Header Attachments : 0
Total of All Attachments : 1

- The **Document Description** is required and does print-out. The description is also searchable from various inquiries like the Procurement Document Inquiry (**PRCUDOC**).
- Select a **Procurement Type ID** that corresponds to the business process being followed.

NOTE: It is important to select the Procurement Type prior to selecting the Cited Authority, in order to filter the choices to only those that are compatible

- The **Cited Authority** represents the authority which enables a user to enter the specific document for the amount specified on the document. This list is pre-filtered by your selection in the **Procurement Type** field.
- You may wish to select an **Accounting Profile** to populate the **Accounting Distribution** section. Once you have selected an **Accounting Profile**, click **Load Accounting Profile** to populate the **Accounting Distribution** section with the Accounting lines associated with the profile. The profile is comprised of one or more Accounting templates, which equate to a common coding string, or a single Accounting line. You may also wish to establish the funding for the document by assembling a template or templates on the **Accounting Distribution** section, or entering the **Fund** and **Detail Accounting** information directly on the **Accounting Distribution** section, or on the Commodity Lines.

NOTE: Do not enter a **Budget FY**, **Fiscal Year**, or **Period**. They will be automatically populated for you when the document is submitted to final.

Complete the Purchase Order **Contact** section:

▼Contact

| | | | |
|----------------|------------------|---|-----------|
| Issuer ID : | Student05 | > | Team ID : |
| | eMARS Student 05 | | Buyer : |
| | 888-888-8888 | | |
| | student@ky.gov | | |
| Requestor ID : | Student05 | > | |
| Name : | eMARS Student 05 | | |
| Phone Number : | 888-888-8888 | | |
| Email : | student@ky.gov | | |

- The **Issuer ID** field will default to your information. If you are completing the document on someone else's behalf then pick their record from the pick-list by clicking on the **arrow** next to the **Issuer ID** field.
- The **Requestor ID** field will be blank and you will need to complete this field. The **Requesting ID** field is used to identify for whom the goods or services are being requested, (e.g who will actually be using the items or services detailed on this Requisition). Pick their record from the Requestor pick-list by clicking on the **arrow** next to the **Requestor ID** field.

Complete the **Extended Description** Field (optional).

▼Extended Description

| | |
|------------------------|--|
| Extended Description : | Reconstruction and/or replacement of the curbs as required for that portion of total project situated within city limits. \$7.00 per linear foot. Maximum of \$8400.00. |
|------------------------|--|

- The **Extended Description** field can be used to further describe the nature of the requirements being requested. This field can store up to 1500 characters of text. This field does not print.

Complete the **Default Shipping/Billing** section. If the same Shipping and Billing information should be used on all lines or most lines of the Purchase Order then complete this section. When you are creating Commodity line items you may click **Ship/Bill To Lines** to have this information automatically populated on the line item. (Optional)

Shipping Location :

Shipping Method :

Free On Board :

Delivery Date :

Delivery Type :

Shipping Additional Info :

Billing Location :

KYTC HWY DIS 7 - LEXINGTON DISTRICT
OFC
763 WEST NEW CIRCLE RD
LEXINGTON
KY
40512
US

Billing Additional Info :

- The **Shipping Location** field is used to identify where the goods requested on the Requisition should be delivered. To select a **Shipping Location** click on the **arrow** next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location (PLOC)** reference table. The **Shipping Location** field is only required on **PO2** documents for each Commodity line with a **Line Type** of "ITEM"
- The **Billing Location** field is used to identify where the Vendor's Invoice should be mailed. Click on the **arrow** next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location (PLOC)** reference table.
- The **Delivery Date** field is used to enter the date by which you will need the goods being requested to be delivered.

NOTE: Do not complete the **Shipping Method**, **Free on Board**, **Shipping additional information**, **Billing Additional Information** and **Delivery Type** fields. These fields are not required. These fields do not print-out.

Complete the **Vendor** Section.

PO2 - 758-0600000013- 1- New- Draft Action Menu

Load T and C Ship/Bill To Lines

| Vendor Line | Vendor Customer | Legal Name | Line Amount | Modified |
|-------------|-----------------|----------------------|-------------|----------|
| 1 | VC0000100082 | City of Lawrenceburg | \$8,400.00 | false |

First Prev Go To Next Last

Vendor

Vendor Customer : VC0000100082 >

Legal Name : City of Lawrenceburg

Alias/DBA : City Treasurer

Address Code : AD001 >

PO Box 290

205 East Woodford ST.

Lawrenceburg

KY

40342

US

Web Address http:// :

Vendor Preference Level : 99

Vendor Contact ID : PC003 >

Vendor Contact Name : City Treasurer

Vendor Contact Phone : 859-123-9876

Vendor Contact Phone Ext. :

Vendor Contact Email : Bill.Banyon@lawrencebur

Secondary Reason :

Modified : false

Discount

- The **Vendor Customer** code field is used to store the eMARS Vendor Code for the Vendor being recorded. Click the **Pick_List** to open the **Vendor Customer** list. You may search for a Vendor by **Legal_Name**, **Last_Name**, **Alias**, and/or **Vendor Active Status**.

NOTE: If you know part of the Vendor Code field you may type it into the **Vendor Customer** field using wildcards. When you click on the **arrow**, the Vendor pick-list will be filtered by the value you have entered.

NOTE: The **Vendor Address ID** and **Contact Information** may default to this document when it is validated, if there is a default indicated on the vendor's record.

NOTE: If this document was generated from an Evaluation document then the **Vendor** section will be pre-populated.

Build **Commodity** Lines. The **Commodity** section of the Contract is used to list all distinct goods or services being requested.

Complete the required fields for the Commodity **General Information** section.

PO2 - 758- 0600000013- 1- New- Draft

Action Menu

Load T and C Ship/Bill To Lines

| Line | CL Description | Line Amount | Modified |
|------|--------------------------------|-------------|----------|
| 1 | Curb Replacement- Lawrenceburg | \$8,400.00 | false |

Insert New Line Insert Copied Line

First Prev Go To Next Last

Vendor 1: VC0000100082 >

Load T and C Ship/Bill From Header

Recalculate Accounting Line Amount

General Information

CL Description: Curb Replacement- Lawrenceburg

Warehouse: >

Commodity: 91319 >

Stock Item Suffix: >

Construction, Curb and Gutter (Includes Maintenance, Repair,

Supplier Part Number: >

Line Type: Service

Quantity: 0.00000

Unit: >

Unit Price: \$0.00

Discounted Unit Price: \$0.00

List Price: \$0.00

Contract Amount: \$8,400.00

T & C Template: >

Fixed Asset: ☐

Lock Order Specs: ☐

Lock Catalog List Price: >

Vendor Preference Level: 99

Commodity Specs:

Extended Description: Reconstruction and/or replacement of the curbs as required for that portion of total project situated within city limits. \$7.00 per line

Non-Reserved Funding Open Amount Total: \$8,400.00

Item Sub Total: \$8,400.00

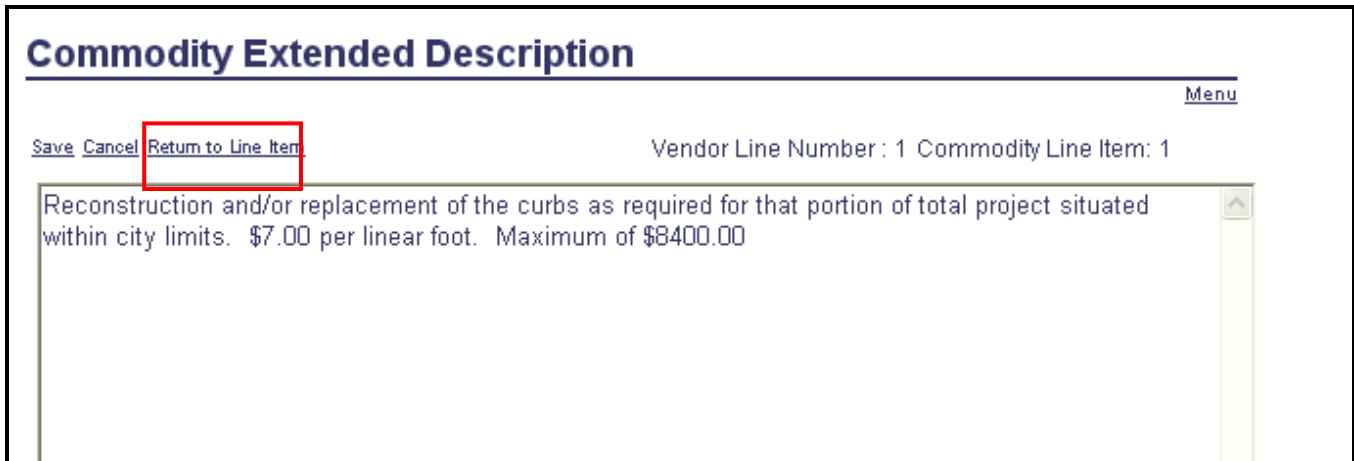
Tax Amount: \$0.00

Line Amount: \$8,400.00

- The **CL Description** field should be used to record a brief description of the good or service being requested. This field does print-out on all documents and is used on subsequent Procurement Documents. This field is displayed in the grid area of the **Commodity** section in order to help you identify which line you would like to inspect or modify.

- The **Commodity** field is used to store the five digit NIGP commodity code that most closely matches the item or service being purchased. This field is used primarily for classification purposes. When creating a Contract it is important to make the first commodity the one that is most relevant to the Contract as a whole. The first Commodity code is used by EMARS to determine which office will receive the Contract for processing.
- The **Line Type** field is used to select how the cost of the line item will be established. Generally speaking, goods should be recorded with a **Quantity**, **Unit of Measure** and **Unit Price** and services should be entered as **Contract Amount**.
 - When you know the **Unit Price** a Line Type of “**Item**” should be selected. The **Unit of Measure**, **Unit Price**, and **Quantity** are required.
 - If the unit cost is unknown or not applicable the lump sum cost of the line should be recorded in the **Contract Amount** field. In this case a line type of “**Service**” should be selected. When the line type is service then the **Service From** and **Service To** dates are required. These dates are the effective dates for resultant award document.
- The **Extended Description** field should be used to provide a detailed description of the desired item. Up to 4000 characters of information can be stored in this field. To access a larger field in which to type the extended description click on the **More Text** link.

NOTE: To insert a TAB into the **Extended Description** field the user must type [Ctrl]+[Tab]. To cut and paste, the user must use the [CTRL] + [C] / [CTRL] + [V] keyboard shortcut.



Complete the **Shipping/ Billing** information section.

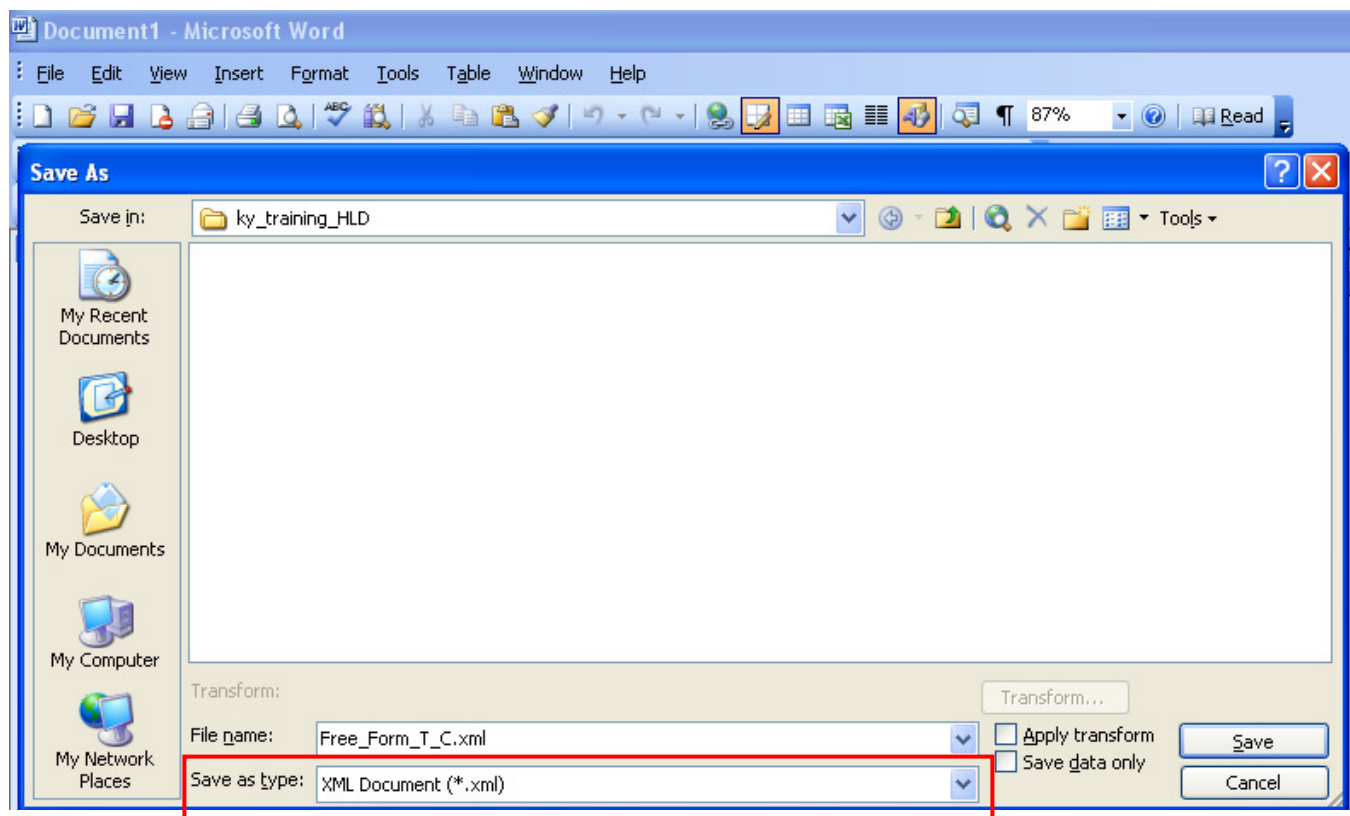
- The **Shipping Location** field is used to identify where the goods requested on the Requisition should be delivered. Click on the **arrow** next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location (PLOC)** reference table.

- The **Billing Location** field is used to identify where the Vendor's Invoice should be mailed. Click on the **arrow** next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location (PLOC)** reference table.

Complete the **Specifications** section (Optional). This section may be used to record additional information that you feel should be stored separately from the Commodity Line extended description.

Add Terms and Conditions.

- The **Terms and Conditions** panel lists all the **Terms and Conditions** that will be assembled into the Final Version of the Contract. You may attach a Word **XML** document that you have created yourself or you may pick a **Terms and Condition** record from the eMARS database.
- The MS-Word documents that you would like to include must be saved in MS-Word as **.XML** before they can be attached.



When creating your MS-Word T&C document observe the following rules:

Do's:

- Do ensure you are utilizing Word 2003 before attempting to edit **T&C**.
- Do set your top margin of your Word Document to 1.5.
- Do save the document as an **.XML** file.
- Do add Supporting Documents when necessary. These documents must also be in **.XML** format, but they will appear below the **Terms and Conditions** when the document is assembled. If multiple attachments are used, there will be a page break between each attachment. If you insert a line accidentally, you need to delete it by using the scissor icon.
- Do use "Normal" formatting for all text.
- Do use "Grid" formatting for all tables.
- Do clear all formatting, and then reformat your bolding, bullets, and justifications if using an existing document for the first time.
- Do select the "Free" **T&C**, then delete the attached file and upload your **.XML** document. If you have inserted a link to a picture(s) in your document, you must upload the picture file(s) after you have uploaded the **.XML** file.
- Do attach any type of document, regardless of file type in the **Header** section.

Don'ts

- Don't use Section breaks – the assembly process stops at the first section break.
- Don't use Page breaks – these are ignored in the assembly process.
- Don't use Track Changes.
- Don't add **T&Cs** to the **Commodity T&Cs** section – add to the **Terms and Conditions** section only.
- Don't insert blank lines in the **Supporting Documents** section.
- Don't insert objects directly into the document.
 - If you have a picture, you must insert as a link to the file.
 - Attach any documents as **Supporting Documents** or in the document **Header** section.

Build the Accounting line(s). Each Commodity line listed in the document will need at least one Accounting line.

Complete the required fields for the Accounting General Information section.

View All (1 of 1) : Document validated successfully

PO2 - 758- 0600000040- 1- New- Draft Action Menu

Load T and C Ship/Bill To Lines

| Line | Line Amount | Line Closed Amount | Modified |
|------|-------------|--------------------|----------|
| 1 | \$8,400.00 | \$0.00 | false |

[Insert New Line](#)
[Insert Copied Line](#)
First Prev Go To Next Last

Commodity 1: 91319 >

General Information

Event Type : PR07

Accounting Template : T61010

Line Amount : \$8,400.00

Object : E797

Budget FY :
 Fiscal Year :
 Period :
 Freight % : 0.0000
 Modified : false
 Number of Attachments : 0

Line Description :

Reserved Funding : No

Line Closed Amount : \$0.00

Line Closed Date :

Referenced Line Amount : \$0.00

Reference

Fund Accounting

Fund : 1100
 Sub Fund :

Object : E797
 Sub Object :

OBSA :
 Sub OBSA :

The **Event Type** is used to determine what posting codes will be used while also bringing in specific rules for data entry concerning referenced transactions, customer codes, vendor codes and all defined chart of account elements in the system. The **PO2** document uses the following **Event Types**:

Encumbering Event Types

- **PR05**- Order from External Vendor
- **PR06**- Order from Internal Vendor

Non-Encumbering Event Types

- **PR07**- Order

Select the **Accounting Template** by selecting the pick list next to the field. Accounting Templates are used to populate the Fund and Detail Accounting elements in the document. Elements of the Accounting Template are inferred after the document is validated. Any values entered by the user either before or after the template has been inferred will override any values from the template.

Indicate the **Sub Total Line Amount**. This is the amount that is allocated to this Accounting Line. The sum of all Accounting Lines must equal the referenced Commodity Line.

Note the Fund and Detail Accounting elements. These elements will be inferred if an Accounting Template is used or may be added by the user.

Click **Validate** to check for errors.

To Assemble:

- 1 From the **Header** Section click on **Assemble Document**
- 2 Click **Submit Assemble Request**
- 3 Click on **Refresh**. You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
- 4 Click **Back** to return to the document

To Print the Assembled Form:

- 1 Return to **Header**
- 2 From the **Action Menu**, select **Attachments**.
- 3 Click **Download**.
- 4 While the **PDF** document is open use the **File Menu Options** to either print or email the document.

Submit the document to initiate workflow for approval.

Navigate to the **Performance Evaluator Table (PEEVALR)** by clicking on the **Home** action button, click on **Search** and click on **Page Search**. Enter “PEEVALR” into the **Page Code Field** and click **Browse**. Click on **Vendor Performance Evaluator** to open the page.

Click **Insert** to add a new row to the table.

Vendor Performance Evaluator

[Menu](#)
[Quick Search](#)

| Award Document | Award Department | Award ID | Evaluator Last Name | Evaluator First Name |
|----------------|------------------|------------|---------------------|----------------------|
| MA | 785 | 0600000009 | Pinkston | Fran |
| ✓ PO | 758 | 0600000017 | Shaw | Matt |
| PON2 | 758 | 0600000004 | Shaw | Matt |

First Prev Next Last

[Save](#)
[Undo](#)
[Delete](#)
[Insert](#)
[Copy](#)
[Paste](#)
[Search](#)

*Award Document :

*Award Department :

*Award ID :

*Evaluator ID : >

*Evaluator Department : >

- In the **Award Document** field, enter the document code on the document for which you wish to establish the Evaluator information.
- In the **Award Department**, enter the department shown on the Document **Header** of the document for which you wish to establish the Evaluator information.
- In the **Award ID**, enter the **Document ID** of the Contract Award just submitted.
- In the **Evaluator ID** field, enter your ID from the pick list, and
- In the **Evaluator Department**, enter the department for the Evaluator entered in the **Evaluator ID** field.

Multiple rows may be entered for as many evaluators as are necessary for each award.

Exercise 4 – Process a stand-alone PO2 for Memorandum of Agreement exempt for GCRC review.

Scenario

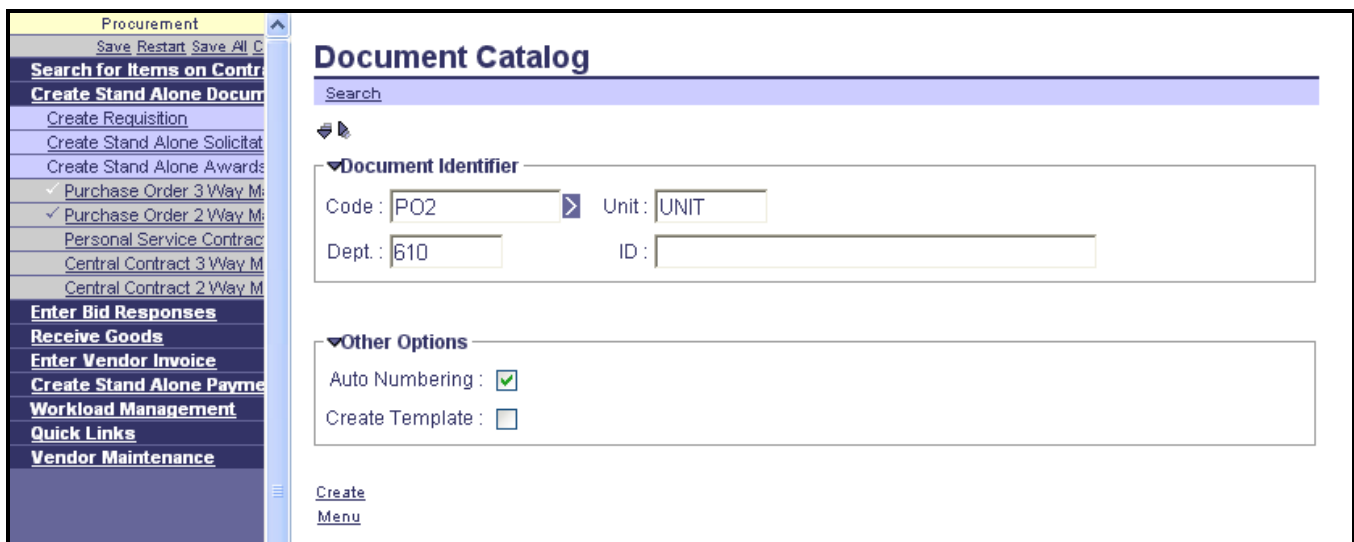
You are in the Transportation Cabinet and you need to establish an Agreement with the City of Lawrenceburg for a Curb maintenance program.

Task Overview

Create a Purchase Order (**PO2**) (Two Way Match) document from your **Procurement Workspace**. You will build **Terms and Conditions** and select a **Vendor**. You will enter a single **Commodity** line and **Accounting** line. You will change the default **Event Type** for the document to be non-encumbering.

Procedures

1. Access your **Procurement Workspace**.
2. Click **Create Stand Alone Document**, expand **Create Stand Alone Awards**, and click **Purchase Order 2 Way Match (PO2)** Click **Create**.





| Required Fields | Values |
|-----------------|-----------------|
| Code | PO2 |
| Dept | Enter: 610 |
| Unit | Enter: UNIT |
| Auto Numbering | Click to select |


3. Click **Create**. The PO2 document opens to the **Header** page.
4. Complete the required and optional information in the Purchase Order **Header**:

PO2 - 610- 0600000014- 1- New- Draft
Action Menu

[Load T and C Ship/Bill To Lines](#)
[Load Accounting Profile](#)
[Assemble Document](#) [View Assembly Request](#)

Header
 

General Information

Document Name :
Record Date : 
Budget FY :
Fiscal Year :
Period :
Document Description :

PCard ID :
PCard Exp :
Procurement Folder :
Procurement Type : MOA/PSC Exception or Exemption
Procurement Type ID :
Cited Authority :
Agreements of local government units :
Accounting Profile :
Terms Template :
Confirmation Order : ☐
Default Form :
Last Print Date :
Total of Header Attachments : 0
Total of All Attachments : 0

Actual Amount : \$0.00
Closed Amount : \$0.00
Closed Date :

| Required Fields | Values |
|----------------------|---|
| Document Description | Curb Replacement – City of Lawrenceburg |
| Procurement Type | 14 Select from the Pick List |
| Cited Authority | KRS 177.280 |
| Budget FY | Leave blank. |
| Fiscal Year | |
| Period | |
| Default Form | Enter: PO_FORM |

5. Complete the **Contact** Section:

▼Contact

Issuer ID :

Student05

>

Team ID :

eMARS Student 05

888-888-8888

student@ky.gov

Buyer :

Requestor ID :

Student05

>

Name :

eMARS Student 05

Phone Number :

888-888-8888

Email :

student@ky.gov

| Required Fields | Values |
|-----------------|---|
| Issuer ID | Leave as is |
| Requestor ID | Select your Student ID from the Pick List |

6. Complete the **Default Shipping/Billing** Section.

▼Default Shipping/Billing

Shipping Location :

>

Billing Location :

3596

>

Shipping Method :

>

Free On Board :

>

Delivery Date :

Delivery Type :

▼

Shipping Additional Info :

Shipping Additional Info

Billing Additional Info :

KYTC HWY DIS 7 - LEXINGTON DISTRICT
OFC
763 WEST NEW CIRCLE RD
LEXINGTON
KY
40512
US

| Required Fields | Values |
|---------------------------------|---------------|
| Shipping Location | Leave Blank. |
| Billing Location | Select "3596" |
| Delivery Date | Leave blank |
| Shipping Method | Leave blank |
| Free on Board | |
| Shipping Additional Information | |
| Billing Additional Info | |
| Delivery Type | |

7. Click **Vendor** on the Secondary Navigation Panel.

PO2 - 610- 0600000014- 1- New- Draft

Action Menu

Load T and C Ship/Bill To Lines

| Vendor Line | Vendor Customer | Legal Name | Line Amount | Modified |
|-------------|-----------------|----------------------|-------------|----------|
| 1 | VC0000100082 | City of Lawrenceburg | \$0.00 | false |

First Prev Go To Next Last



Vendor

Vendor Customer : VC0000100082

Vendor Contact ID : PC003

Legal Name : City of Lawrenceburg

Vendor Contact Name : City Treasurer

Alias/DBA : City Treasurer

Vendor Contact Phone : 859-123-9876

Address Code : AD001

Vendor Contact Phone Ext. :

PO Box 290

205 East Woodford ST.

Vendor Contact Email : Bill.Banyon@lawrenceburg

Lawrenceburg

KY

40342

US

Secondary Reason :

Web Address http:// :

Modified : false

Vendor Preference Level : 99

| Required Fields | Values |
|-----------------|----------------|
| Vendor Customer | "VC0000100082" |

8. Click **Terms and Conditions** on the Secondary Navigation Panel. Click **Insert New Line**

Action Menu

Load T and C Ship/Bill To Lines

| Section | T & C | Name | Date | Inc by | Modified |
|---------|-------|-----------------------------------|------------|--------------|----------|
| ✂ | ✓ 1 | 8_09TR 09TRANS GENERAL CONDITIONS | 01/01/2006 | by full text | false |

Insert New Line Insert Copied Line
First Prev Go To Next Last

General Information

T & C : 8_09TR
Name : 09TRANS GENERAL CO
Section : 1
Sequence :
Date : 01/01/2006
Details :

Inc by : by full text
Modified : false
T&C Attachment File Name : 8_09TRANS.XML

Edit Print Copy Forward Close

Menu

| Required Fields | Values |
|-----------------|------------------|
| T&C | "MOA1" |
| Inc by: | Select Full Text |

9. Click **Save** to load the default **Terms and Condition** information.
10. Click **Commodity** on the Secondary Navigation Panel. Click **Insert New Line**

11. Complete the required fields for the Commodity **General Information** section.

Load T and C Ship/Bill To Lines

| Line | CL Description | Line Amount | Modified |
|------|--------------------------------|-------------|----------|
| 1 | Curb Replacement- Lawrenceburg | \$8,400.00 | false |

Insert New Line Insert Copied Line

First Prev Go To Next Last

Vendor 1: VC0000100082 >

Load T and C Ship/Bill From Header

General Information

CL Description: Curb Replacement- Lawrenceburg

Warehouse:

Commodity: 91319

Stock Item Suffix:

Construction, Curb and Gutter (Includes Maintenance, Repair,

Supplier Part Number:

Line Type: Service

Quantity: 0.00000

Unit:

Unit Price: \$0.00

Discounted Unit Price: \$0.00

List Price: \$0.00

Contract Amount: \$8,400.00

Service From: 05/02/2006

Service To: 05/02/2007

T & C Template:

Fixed Asset:

Lock Order Specs:

Lock Catalog List Price:

Vendor Preference Level: 99

Commodity Specs:

Extended Description: Reconstruction and/or replacement of the curbs as required for that portion of total project situated within city limits. \$7.00 per linear

Non-Reserved Funding Open Amount Total: \$0.00

Item Sub Total: \$8,400.00

Tax Amount: \$0.00

Line Amount: \$8,400.00

Closed Amount: \$0.00

Closed Quantity: 0.00000

Closed Contract Amt: \$0.00

| Required Fields | Values |
|----------------------|--|
| CL Description | Curb Replacement- Lawrenceburg |
| Commodity | 91319 |
| Line Type | Service |
| Contract Amount | 8400.00 |
| Service From | Select "One Month from Today" |
| Service To | Select "Two Months from Today" |
| Extended Description | "Reconstruction and/or replacement of the curbs as required for that portion of total project situated within city limits. \$7.00 per linear foot. Maximum of \$8400.00" |

12. Click **Ship/Bill From Header**

13. Click **Accounting** from the Secondary Navigation Panel.

14. Click **Insert New Line**. Complete the Required fields for the Accounting Line.

PO2 - 610- 0600000014- 1- New- Draft

Action Menu

Load T and C Ship/Bill To Lines

| Line | Line Amount | Line Closed Amount | Modified |
|------|-------------|--------------------|----------|
| 1 | \$8,400.00 | \$0.00 | false |

Insert New Line
Insert Copied Line

First Prev Go To Next Last
Commodity 1: >

Event Type : PR07
Accounting Template : T61010

Line Description :

Line Amount : \$8,400.00

Reserved Funding : No
Line Closed Amount : \$0.00
Line Closed Date :
Referenced Line Amount : \$0.00

Budget FY :
Fiscal Year :
Period :
Freight % : 0.0000
Modified : false

Number of Attachments : 0

Reference

Fund : 1100
Sub Fund :
Department : 610
Unit : UNIT

Object : E797
Sub Object :
Revenue :
Sub Revenue :

OBSA :
Sub OBSA :
Dept Object :
Dept Revenue :

| Required Fields | Values |
|---------------------|--------|
| Event Type | PR07 |
| Accounting Template | T61010 |
| Line Amount | 8400 |
| Object | E797 |

15. Click **Validate** to populate the Accounting elements associated with the Accounting Template.

To Assemble:

- 1 From the **Header** Section click on **Assemble Document**
- 2 Click **Submit Assemble Request**
- 3 Click on **Refresh**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
- 4 Click **Back** to return to the document

To Print the Assembled Form:

- 1 Return to **Header**
- 2 From the **Action Menu**, select **Attachments**.
- 3 Click **Download**.
- 4 While the **PDF** document is open use the **File Menu Options** to either print or email the document.

16. **Submit** the document to initiate workflow for approval.

9 – Performance Evaluation (PE)

In order to document a Vendor's record at meeting their contractual obligations, you should complete the Vendor **Performance Evaluation (PE)** document. The data entered on the **PE** document will be used to determine if Vendors should receive future Awards or have their existing Master Agreements renewed.

Evaluations are standardized based on the **Procurement Type** on the award document.

Evaluations can only be performed with reference to awards established in the system (**CT, DO, MA, and PON2**).

Vendor Performance

From the Document Catalog locate the award being evaluated. Open the award and click **Copy Forward**. The **Copy Forward** page opens.

On the **Copy Forward** page enter your **Document Department Code** and **Unit Code**. Select **Auto Numbering** to have eMARS generate the **PE** Document ID. Check **PE** for Select Target Doc Type. Click **OK** to open the **PE** document.

Copy Forward

From Document

Category : PROC
Doc Dept : 758

Type : PO
Doc Unit : UNIT

Code : PON2
ID : 0600000004

Select Entire Document : ☒
Version : 1

To Document

Doc. Department Code : 758
Document Id :

Unit Code : UNIT
Auto Numbering : ☒

| Target Doc Type | Target Doc Code | Description |
|--|-----------------|------------------------|
| <input checked="" type="checkbox"/> PE | PE | |
| <input type="checkbox"/> TM | TM | |
| <input type="checkbox"/> PR | PRC | Pay for Order |
| <input type="checkbox"/> PR | PRCI | Pay for Order Internal |

First Prev Next Last

OK
Cancel

Complete the **General Information** section of the **PE**. This section is used to establish which eMARS user is performing the evaluation as well as the time period being assessed. Note that all the information from the award has automatically populated the **PE** document.

NOTE: It is the responsibility of the Buyer who established the award to set-up who will be performing the evaluation by making an entry on the Vendor Performance Evaluator (**PEEVALR**) table at the time the Award is submitted.

| | |
|---------------------------|---|
| PE 758 0600000008 1 | Load Criteria and Procedures |
| Document View | General Info |
| ✓ Header | Evaluator ID : <input type="text" value="mshaw"/> |
| Procedures | Evaluator First Name : <input type="text" value="Matt"/> |
| Criteria | Evaluator Last Name : <input type="text" value="Shaw"/> |
| Notes | Award Document Code : <input type="text" value="PON2"/> |
| Document Comments | Award Department : <input type="text" value="758"/> |
| Document History | Award Number : <input type="text" value="0600000004"/> |
| Document Reference | Award Title : <input type="text" value="Pre-Sentence Investigation writers"/> |
| Future Triggering | Vendor Code : <input type="text" value="VC0000100001"/> |
| | Vendor : <input type="text" value="PR Test 1"/> |
| | Alias/DBA : <input type="text"/> |
| | Procurement Type : <input type="text" value="Personal Service Contract"/> |
| | Procurement Folder : <input type="text" value="38801"/> |
| | Award Begin Date : <input type="text"/> |
| | Award End Date : <input type="text"/> |
| | Award Date : <input type="text" value="04/10/2006"/> |
| | Award Amount : <input type="text" value="1200.00"/> |
| | Evaluation Date : <input type="text" value="04/11/2006"/> |
| | Period Begin Date : <input type="text" value="04/04/2005"/> |
| | Period End Date : <input type="text" value="04/13/2006"/> |
| | Recommended for Future Contracts : <input checked="" type="checkbox"/> |

- **Evaluator ID:** Type in your User ID- or find your ID from the **Evaluator ID** pick list.
- The **Evaluation Date** is the date this evaluation is being completed. Enter the current date.
- **Period Begin Date / Period End Date.** Please enter the time period being evaluated.




Click **Load Criteria and Procedures** at the top of the page to load the standardized **Evaluation Criteria** and the **PE** document procedures. Click **Procedures** in the Secondary Navigation Panel to transition to the Document Procedures page.

Document when all mandatory Procedures were completed by entering the date on which they were completed. Procedures are recommended tasks that be performed as part of the performance evaluation process.

PE - 758- 0600000008- 1- New- Draft

Action Menu

Procedures Summary

| | Procedure Completed | Procedure Name | Required | Completion Date |
|---|---------------------|----------------------------|----------|-----------------|
|  ✓ | false | Delivery Statistics Review | false | |
|  | false | Shipping Statistics Review | false | |
|  | false | Billing Statistics Review | false | |


First Prev Go To Next Last

Evaluation Procedures

Procedure Completed :

Procedure Name :

Required :

Completion Date : 

Menu

- The **Completion Date** is the date on which the Procedure was finished.

Click **Criteria** in the Secondary Navigation Panel to access the **Evaluation Criteria** page. This page lists the Criteria that were loaded from the Vendor Performance Evaluation Template table. You must rank each of the criteria on this detail section (Unsatisfactory, Poor, Fair, Good, Excellent or Not applicable).

PE 758 0600000008 1
Document View
Header
Procedures
Criteria
Notes
Document Comments
Document History
Document Reference
Future Triggering

| Criteria Name | Rank | Description |
|--|------|---|
| ✓ APPLICATION OF REQUIREMENTS AND GUIDANCE | | Comment on contractor's |
| BUDGET | | Comment on contractors |
| COST CONTROL | | Comment on contractors |
| COMMUNICATIONS | | Comment on clarity and effectiveness of |
| DELIVERABLES | | Comment on clarity, |
| INNOVATION | | Comment on contractor's ability |
| PROJECT PLAN | | Comment on contractor's ability |
| QUALITY | | Comment on technical accuracy, |
| REQUIREMENTS | | Comment on contractor's |
| RESPON | | Comment on contractor's |

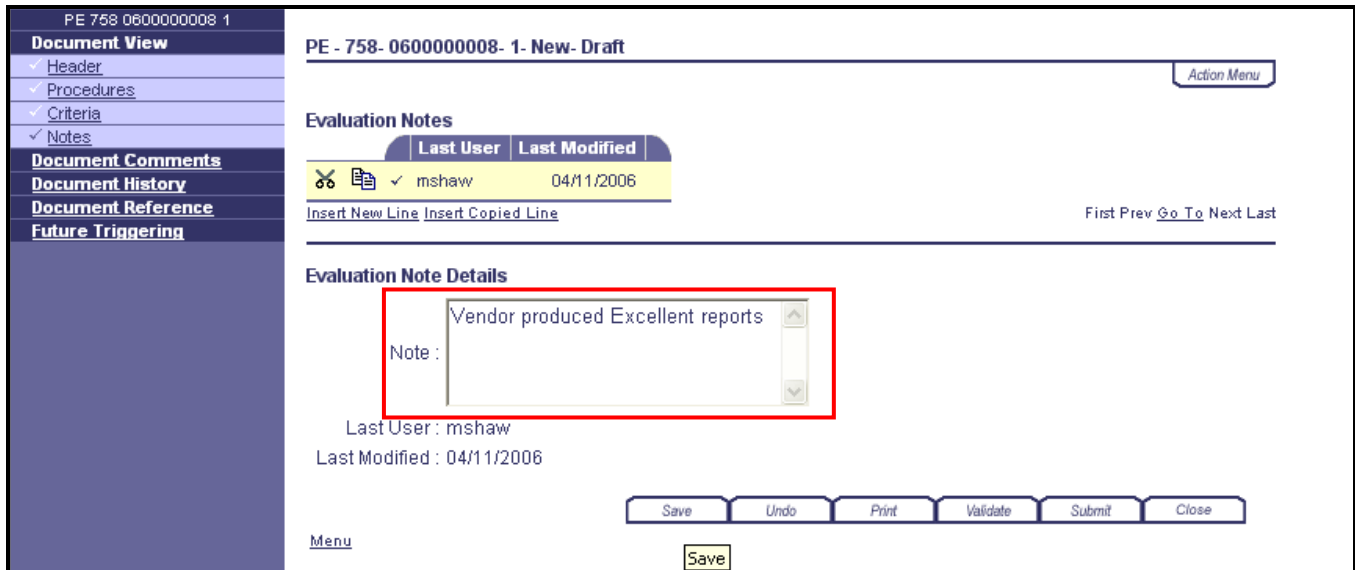
First Prev Go To Next Last

EvaluationCriteria
Criteria Name :
Rank :

1 - Unsatisfactory
2 - Poor
3 - Fair
4 - Good
5 - Excellent
Not Applicable

- The **Rank** field is used to record your opinion of the Vendor's service levels. You must record a Ranking for each criteria that was loaded from the template.

Click **Notes** in the Secondary Navigation Panel. The Notes page opens where you may record specific comments or anecdotal information supporting your evaluation / assessment.



PE 758 0600000008 1

Document View

- Header
- Procedures
- Criteria
- Notes
- Document Comments
- Document History
- Document Reference
- Future Triggering

PE - 758- 0600000008- 1- New- Draft

Action Menu

Evaluation Notes

| Last User | Last Modified |
|-----------|---------------|
| mshaw | 04/11/2006 |

Insert New Line Insert Copied Line

First Prev Go To Next Last

Evaluation Note Details

Note : Vendor produced Excellent reports

Last User : mshaw

Last Modified : 04/11/2006

Menu

Save Undo Print Validate Submit Close

Save

- The **Note** field can record up to 1500 characters of information per Note. Please take the time to enter as much detail about your experience with the Vendor and your assessment of their performance against the award in question.

Click **Validate** to check for errors.

How to print the PE document:

Navigate to each section of the document starting at the Header section. Open up each field of the document that you want to view on your printed document. Once you have the fields open, right click on your mouse and select **Print Page**.

Submit the document to final.



This page intentionally blank.

Exercise 5 – Record Vendor Performance (PE)

Scenario

You need to document the vendor's performance for the Personal Service Contract you created in the previous exercise.

Task Overview

You will access the Contract document created in Exercise 3 and Copy Forward to a **Performance Evaluation** document (PE)

Procedures

- From the Document Catalog locate **PON2 758 0600000006** listed on your Student card. Open the award and click **Copy Forward**. The **Copy Forward** page will open.

Copy Forward

From Document

Category: Doc Dept:

Type: Doc Unit:

Code: ID:

Select Entire Document: ☒ Version:

To Document

Doc. Department Code: Document Id:

Unit Code: Auto Numbering: ☒

| Target Doc Type | Target Doc Code | Description |
|--|-----------------|------------------------|
| <input checked="" type="checkbox"/> PE | PE | Evaluate Contract |
| <input type="checkbox"/> PR | PRC | Pay for Order |
| <input type="checkbox"/> PR | PRCI | Pay for Order Internal |

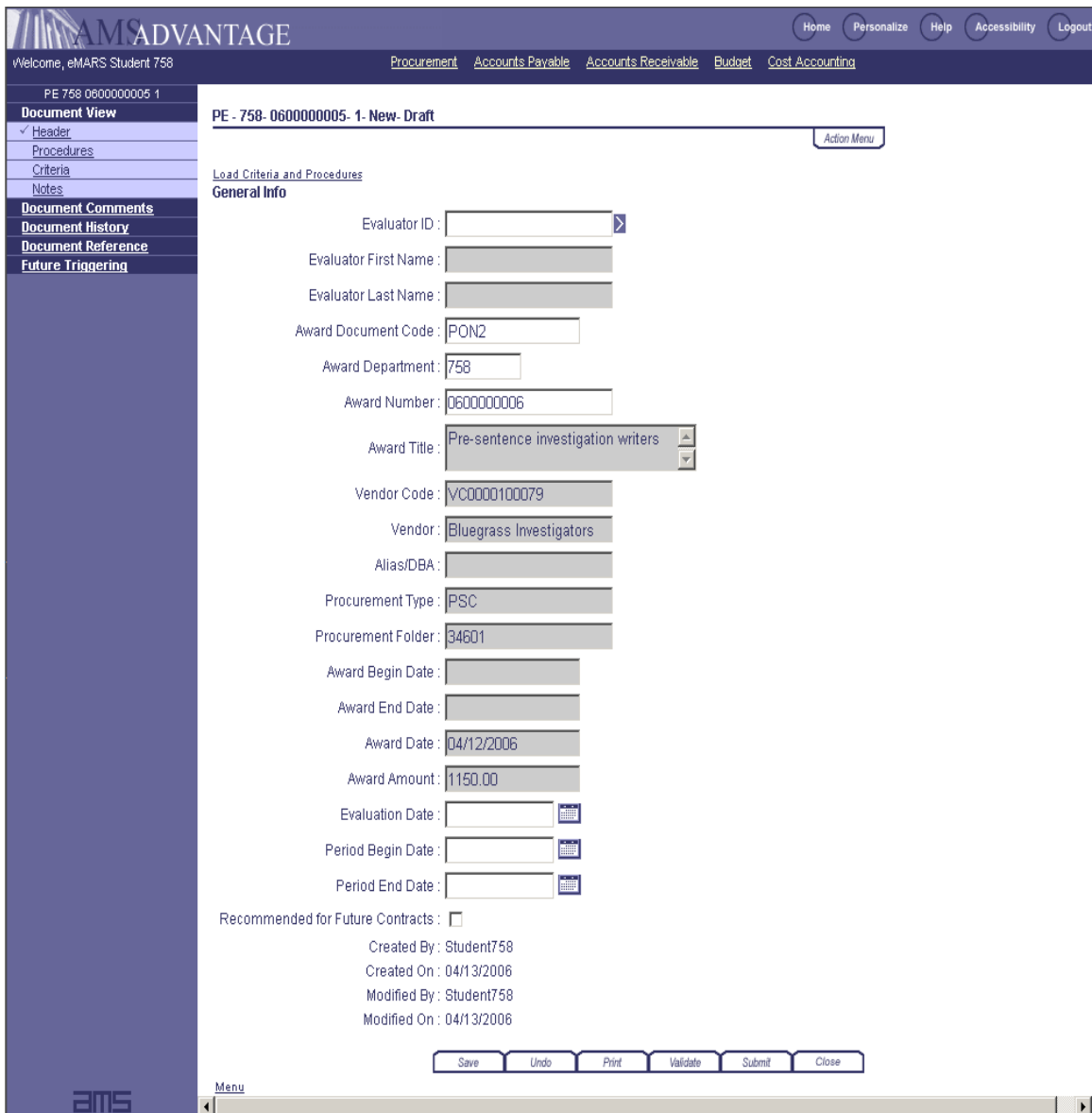
First Prev Next Last

OK Cancel

- Enter the following required fields:

| Required Fields | Values |
|----------------------|-----------------------|
| Doc. Department Code | See Student Card |
| Unit Code | UNIT |
| Auto-Numbering | Select the check box. |

- Ensure that the **PE** row is selected in the grid and click **OK**. A **Performance Evaluation** document (**PE**) is created.
- Complete the **General Information** section of the **PE**. This section is used to establish which eMARS user is performing the evaluation as well as the time period being assessed. Note that all the information from the award has automatically populated the **PE** document.



The screenshot displays the AMS ADVANTAGE web application interface. The top navigation bar includes links for Home, Personalize, Help, Accessibility, and Logout. Below this, a secondary bar shows various system modules: Procurement, Accounts Payable, Accounts Receivable, Budget, and Cost Accounting. The main content area is titled 'PE - 758- 0600000005- 1- New- Draft'. On the left, a sidebar menu lists options such as Document View, Header, Procedures, Criteria, Notes, Document Comments, Document History, Document Reference, and Future Triggering. The 'General Info' section contains several input fields, many of which are pre-populated with data from an associated award. These fields include: Evaluator ID (with a dropdown arrow), Evaluator First Name, Evaluator Last Name, Award Document Code (PON2), Award Department (758), Award Number (0600000006), Award Title (Pre-sentence investigation writers), Vendor Code (VC0000100079), Vendor (Bluegrass Investigators), Alias/DBA, Procurement Type (PSC), Procurement Folder (34601), Award Begin Date, Award End Date, Award Date (04/12/2006), Award Amount (1150.00), Evaluation Date, Period Begin Date, Period End Date, and a checkbox for 'Recommended for Future Contracts'. At the bottom of the form, there are buttons for Save, Undo, Print, Validate, Submit, and Close. The footer of the application shows the AMS logo and a 'Menu' link.




| Required Fields | Values |
|-------------------|---|
| Evaluator ID | Select your Student ID from the Evaluator ID pick list. |
| Evaluation Date | Enter Today's Date |
| Period Begin Date | Enter Yesterday's Date |
| Period End Date | Enter Yesterday's Date |

- Click **Load Criteria and Procedures** at the top of the page to load the standardized Evaluation Criteria and the **PE** document procedures.
- Click **Procedures** in the Secondary Navigation Panel to transition to the Procedures Summary page.
- Select the **first** and **third** Procedures in the grid and document when each procedure was completed by entering the date on which they were completed.

PE - 758- 0600000005- 1- New- Draft

Action Menu

Procedures Summary

| | Procedure Completed | Procedure Name | Required | Completion Date |
|---|---------------------|----------------------------|----------|-----------------|
|  | ✓ false | Delivery Statistics Review | false | |
|  | false | Shipping Statistics Review | false | |
|  | false | Billing Statistics Review | false | |


First Prev [Go To](#) Next Last

Evaluation Procedures

Procedure Completed : false

Procedure Name : Delivery Statistics Review

Required : false

Completion Date : 

Save

Undo

Print

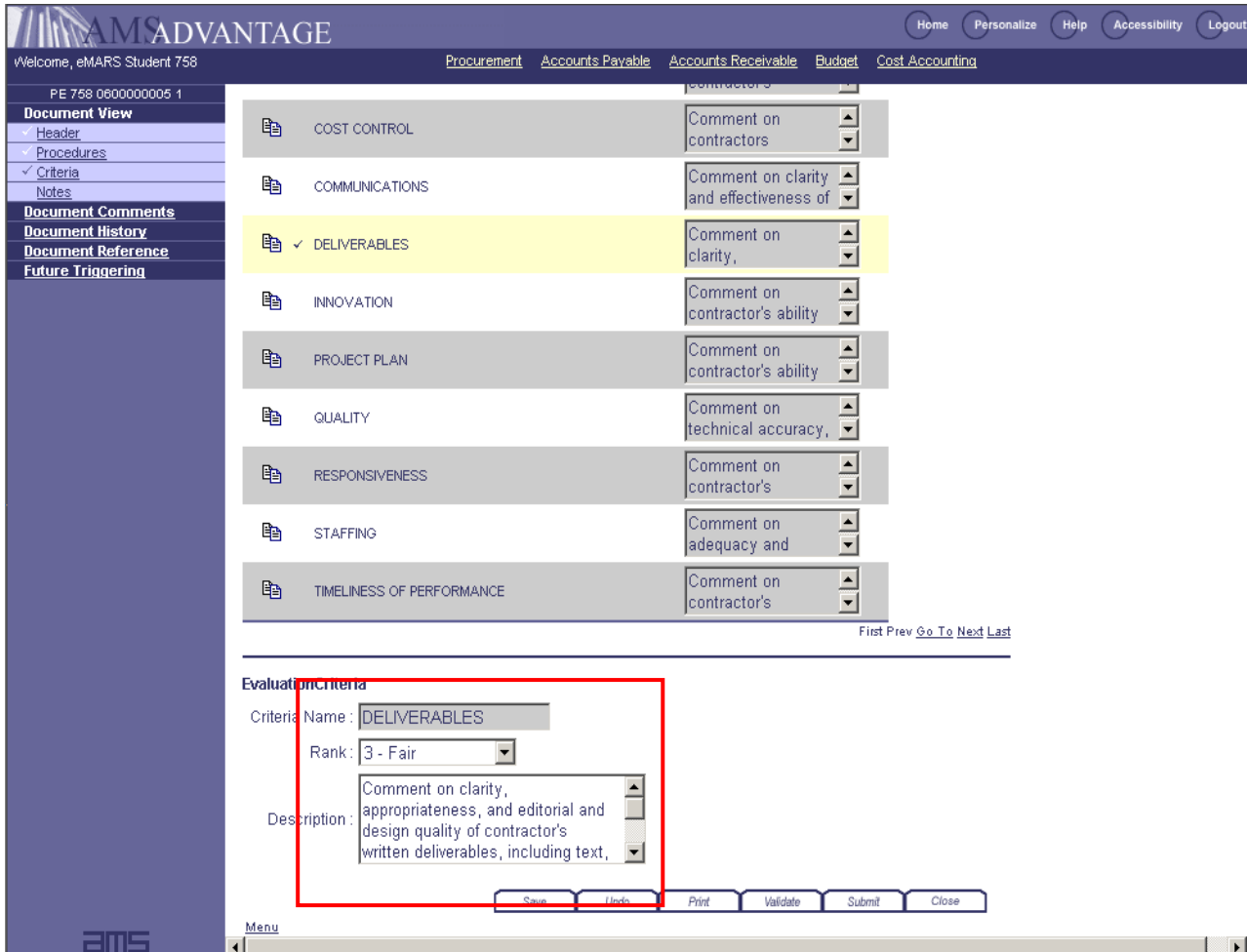
Validate

Submit

Close

| Required Fields | Values |
|-----------------|---|
| Completion Date | Click on the calendar and enter Today's Date . |

8. Click **Criteria** in the Secondary Navigation Panel to access the Evaluation Criteria page. This page lists the Criteria that were loaded from the Vendor Performance Evaluation Template table. Rank each of the criteria on this detail section (Unsatisfactory, Poor, Fair, Good, Excellent or Not applicable).



| Required Fields | Values |
|-----------------|--|
| Rank | Select "3-Fair" for <u>each</u> Evaluation Criteria. |

9. Click **Notes** in the Secondary Navigation Panel. The Notes page opens where you may record specific comments or anecdotal information supporting your evaluation/assessment.

PE - 758- 0600000005- 1- New- Draft

Action Menu

Evaluation Notes

Last User

Last Modified

✂

📄

✓

Insert New Line

Insert Copied Line

First Prev Go To Next Last

Evaluation Note Details

Note :

75% of vendor's reports are late or incomplete.

Last User :

Last Modified :

Save

Undo

Print

Validate

Submit

Close

Menu

10. Click **Insert New Line** and enter the following:

| Required Fields | Values |
|-----------------|--|
| Note | Enter “75% of vendor’s reports were incomplete or inaccurate.” |

11. Click **Validate** and then **Submit** the document to final.



This page intentionally blank.

10 – Online Inquiries

Lifecycle (LINQ)

The **Lifecycle Inquiry (LINQ)** page allows you to view the complete chain of documents associated with a selected search document. When a search is performed, the document entered as the search criteria must have a **Phase** of “Final” or “Historical Final”.

The **Lifecycle Inquiry** page may be accessed directly from one of two places: **Procurement Document Inquiry** or the **Lifecycle Document Search**. The Procurement Document Inquiry (PRCUDOC) allows the user to search by **Procurement Folder ID**, **Procurement Title**, or **Document Department**, or **ID**. The **Lifecycle Document Search Inquiry (LINQ)** provides similar search capabilities to the Document Catalog with the addition of being able to search by Document Description.

Lifecycle Document Search

[Menu](#)


▼Document Identifier

Doc Code : > Doc Unit :
 Doc Dept : Doc ID :

▼Document Description

Document Description :

▼User Information

Create User ID : Create Date : 

▼Document State

Function :

[Browse](#) [Clear](#)

| Code | Dept. | Unit | ID | Function | Version | Phase | Document Description | Create User ID | Create Date |
|------|-------|------|----------------------------|--------------|---------|--------------------|-----------------------------------|----------------|-------------|
| PO | 758 | UNIT | 0600000040 | New | 1 | Draft | asdfsad | tsnapp | 03/17/2006 |
| PO | 758 | UNIT | 0600000042 | New | 1 | Historical (Final) | test TC | tsnapp | 03/20/2006 |
| PO | 758 | UNIT | 0600000042 | Modification | 2 | Final | test TC | tsnapp | 03/20/2006 |
| PO | 758 | UNIT | 0600000044 | New | 1 | Draft | stuff | mshaw | 03/20/2006 |
| PO | 758 | UNIT | 0600000045 | New | 1 | Historical (Final) | test invoice with mod in progress | tsnapp | 03/20/2006 |
| PO | 758 | UNIT | 0600000045 | Modification | 2 | Final | test invoice with mod in progress | tsnapp | 03/20/2006 |
| ✓ PO | 758 | UNIT | 0600000052 | New | 1 | Final | Canoes and Paddle Boats | mshaw | 03/29/2006 |
| PO | 758 | UNIT | WORKFLOW | New | 1 | Final | Building Services | dsweasy | 03/06/2006 |

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Exercise 6 – Perform a Lifecycle Inquiry (LINQ)

Scenario

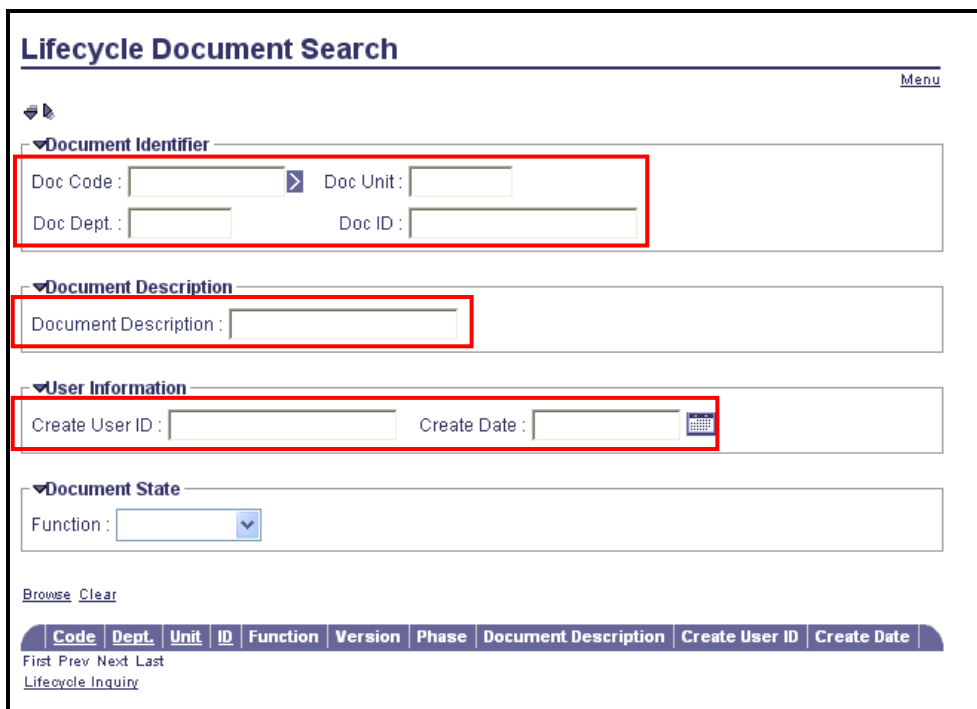
You need to find out the status of a Contract and see what other documents have referenced it.

Task Overview

You will access the **Lifecycle Document Search** page to find the specific Contract .

Procedures

1. Access your **Procurement Workspace**. Expand the **Quick Links** section and click **Lifecycle Document Search (LFDOCSCH)**. The Inquiry will open.



Lifecycle Document Search [Menu](#)

Document Identifier

Doc Code : Doc Unit :

Doc Dept : Doc ID :

Document Description

Document Description :

User Information

Create User ID : Create Date :

Document State

Function :

[Browse](#) [Clear](#)

| Code | Dept | Unit | ID | Function | Version | Phase | Document Description | Create User ID | Create Date |
|-----------------------------------|------|------|----|----------|---------|-------|----------------------|----------------|-------------|
| First Prev Next Last | | | | | | | | | |
| Lifecycle Inquiry | | | | | | | | | |

| Required Fields | Values |
|-----------------|------------|
| Document Code | PON2 |
| Doc Dept | 758 |
| Document ID | 0600000006 |

- Click **Browse** to see all the documents that match your search parameters.

Lifecycle Document Search

[Menu](#)

Document Identifier

Doc Code : PON2

Doc Unit :

Doc Dept : 758

Doc ID : 000006

Document Description

Document Description :

User Information

Create User ID :

Create Date :

Document State

Function :

[Browse](#)
[Clear](#)

| Code | Dept. | Unit | ID | Function | Version | Phase | Document Description | Create User ID | Create Date |
|--------|-------|------|------------|----------|---------|-------|------------------------------------|----------------|-------------|
| ✓ PON2 | 758 | UNIT | 0600000006 | New | 1 | Final | Pre-sentence investigation writers | Student758 | 04/12/2006 |

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[Lifecycle Inquiry](#)

- Select the row of the document you are searching for and click the **Lifecycle Inquiry**. The Lifecycle Inquiry will open populated with the document's information.

Lifecycle Inquiry

[Menu](#)

Back

Clear

Document Search

Document Code : PON2

Document Department : 758

Document ID : 0600000006

Document Filter

| Document ID | Function | Version | Document Description | Create User ID | Acceptance Date |
|--|----------|---------|----------------------|----------------|-----------------|
| <div> First Prev Next Last </div> <div> <div>Forward</div> <div>Backward</div> <div>Download To Excel</div> </div> | | | | | |

4. Click **Forward** to view all documents that reference the Source document.

Lifecycle Inquiry

[Menu](#)

[Back](#) [Clear](#)

▼ Document Search

Document Code :

Document Department :

Document ID :

▶ Document Filter

Results for Search Document: PON2 - 758- 0600000006

| | Document ID | Function | Version | Document Description | Create User ID | Acceptance Date |
|---|--|----------|---------|------------------------------------|----------------|-----------------|
| ✓ | PON2,758,06000000006,1 | New | 1 | Pre-sentence investigation writers | Student758 | 04/12/2006 |
| | PE,758,06000000005,1 | New | 1 | Pre-sentence investigation writers | Student758 | 04/13/2006 |

First Prev Next Last

Forward

Backward

Download To Excel

5. Select a row in the results grid and click **Backward** to view all documents that are referenced by the selected document.

11 – Session Review

Summary Review of Topic

You should now be able to:

- Conduct a Competitive Negotiation using Solicitation, Solicitation Response and Evaluation document
- Create a **PON2** document and complete the **PON2** component
- Evaluate Vendor Performance related to a **PON2**
- Track documents and work in progress using **Lifecycle Inquiry**

Summary Review of Topic Quizzes

| Review Questions | |
|------------------|---|
| A | Terms and Conditions may only be attached as MS-Word documents saved as .XML . True or False |
| B | Due to the implementation of eMARS the LRC will no longer require a Proof of Necessity to be included with each Personal Service Contract or Memorandum of Agreement. True or False. |
| C | You may download an EXCEL tabulation of all Bids received from the EV document Action Menu . True or False. |
| D | The PE document allows you to record free form comments about a Vendors Performance. True or False |

Logout

You will complete this exercise by logging out of eMARS.

1. Click **Logout**. This closes the eMARS application and ends your session. You can now close the open browser windows.

NOTE: Please remember to select **Logout** prior to closing your eMARS session. Just closing the page will not immediately end your session.

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